VANCOUVER ISLAND/COAST

Tourism Development Strategy

The Report of the Vancouver Island/Coast Tourism Task Force

Prepared for
The Ministry of Development, Trade and Tourism

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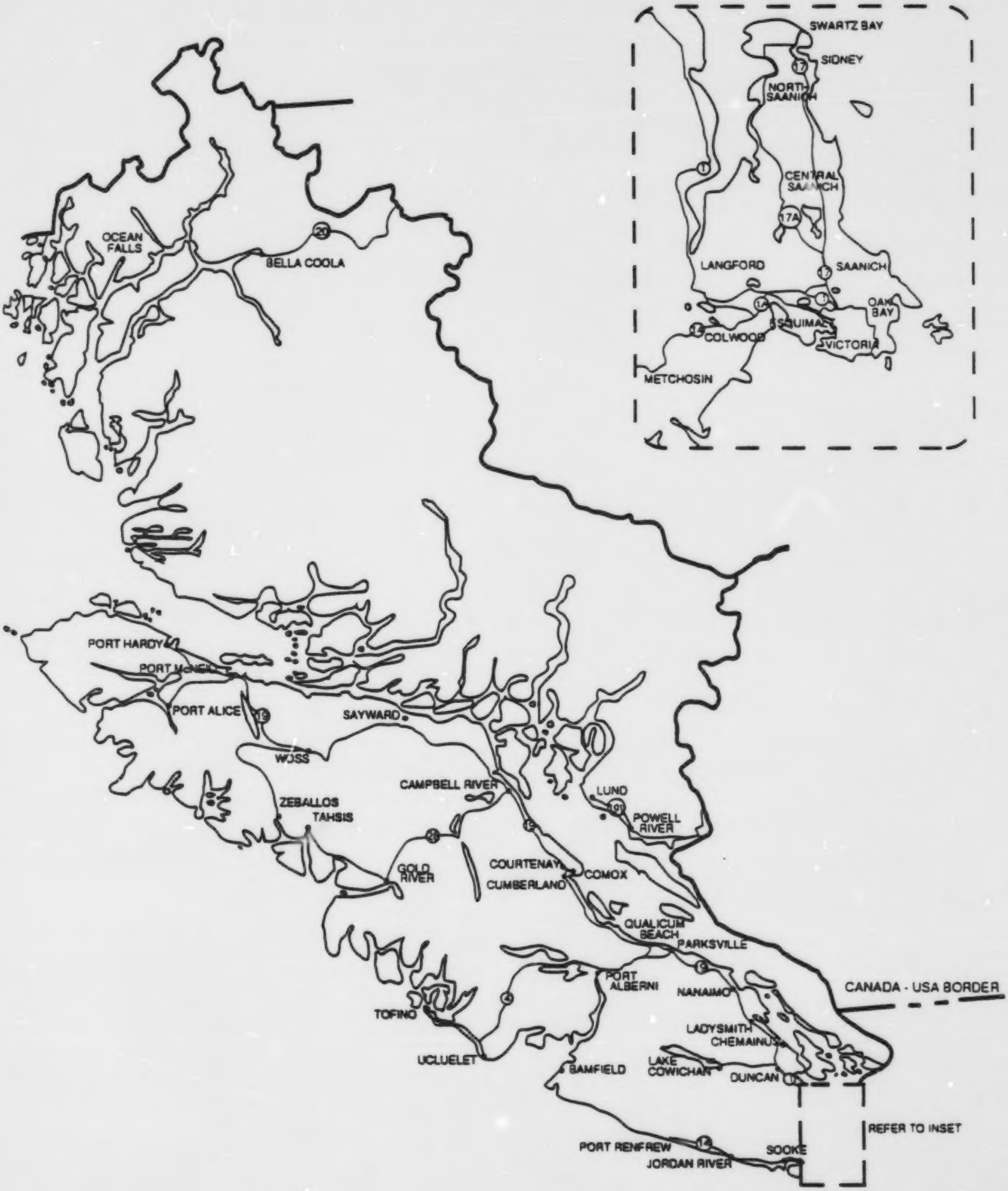
REGION ONE - VANCOUVER ISLAND/COAST



SWARTZ BAY
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SAANICH
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OAK BAY
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ESQUIMALT
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COLWOOD
VICTORIA
METCHOSIN
OCEAN FALLS
20
BELLA COOLA
PORT HARDY
PORT McNEILL
PORT ALICE
19
SAYWARD
WOSS
CAMPBELL RIVER
ZEBALLOS
TAHSIS
28
LUND
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POWELL RIVER
GOLD RIVER
COURTENAY
COMOX
CUMBERLAND
QUALICUM BEACH
PARKSVILLE
PORT ALBERNI
NANAIMO
CANADA - USA BORDER
4
TOFINO
LADYSMITH
CHEMAINUS
UCLUELET
BAMFIELD
LAKE COWICHAN
DUNCAN
REFER TO INSET
PORT RENFREW
14
SOOKE
JORDAN RIVER

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The project was carried out over the period from June 1990 to May 1991. The task force members involved in the study are all volunteers who have dedicated countless hours to ensure that this strategy becomes a useful document for the enhancement of the tourism industry in the region. It is also appropriate to note the cooperation and support of the farsighted employers and local organizations which allowed the task force members to devote as much time as they did to the strategy.

Vancouver Island/Coast Task Force:

Norma Sealey - Former Mayor of Sidney
William Kinley - Former Alderman of Port McNeill
Greg Goodwin - General Manager, Cowichan Valley Business Development Centre
Bashir Khalafawi - General Manager, Bayside Inn - Parksville
Jane Howard - Comox Valley Free Press, Coordinator, Filberg Festival
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Brian Roe - Former Chairman, Central Coast Regional District
Elke Cummings - Manager, Powell River Chamber of Commerce
Bob Sheeley - General Manager, Tourism Nanaimo
Norm McLaren - Executive Director, Campbell River Tourism
Ursula Fryer - President, Pacific Rim Tourism Association

> *"To share with visitors the abundance of our natural resources and rich cultural heritage in a way which will enhance their awareness and enjoyment, without negatively impacting on our unique environment. From the thrill and excitement of wilderness adventure, to the calm and serenity of the rainforest and the tidal dance of the ocean, there is something for everyone in our all-season playground."*
>
> Norma Sealey

EXECUTIVE SUMMARY

BACKGROUND

The Vancouver Island/Coast Region Tourism Development Strategy has been prepared to guide the development of tourism in the region. It is designed to assist the various levels of government with jurisdiction in the region, and the private sector by identifying and categorizing tourism development opportunities.

This project was completed by the Vancouver Island/Coast Tourism Task Force. This group of 11 tourism-oriented persons represents various tourist organizations from Victoria to Bella Coola. The project was financially sponsored by the Ministry of Development, Trade and Tourism. Research and report-writing was completed by the Economic Planning Group.

This project took place over an 11-month period from June 1990 to May 1991. The techniques employed to produce the report included a review of existing relevant tourism reports, interviews with tourism representatives, field investigations, public open houses, and Task Force workshops. This report is the final product of five earlier drafts.

The report is intended to be used by a variety of readers. These include existing tourism operators, potential developers, tourism associations, financial institutions, native bands, local/regional governments and various provincial ministries. The following material summarizes the key findings.

RESOURCES

The Vancouver Island/Coast Region possesses a diverse tourism resource base. Generally, the region's tourism product is spectacular and offers tremendous variety. Several resources are world-class and there are opportunities for four-season tourism.

The region boasts an impressive array of high-quality physical features ranging from rugged mountain wilderness areas and scenic pastoral landscapes to excellent beaches and lakes. Many species of common and more exotic plant and animal life inhabit the area, while a large number of regional, provincial and national parks have been established to protect some of the area's more outstanding scenic and wildlife features and resources.

The region has a large number of museums, galleries, heritage structures and sites, as well as a diverse native culture. Some areas enjoy a wider range of heritage, art and cultural attractions than others, but generally the region's resources are impressive.

In terms of commercial attractions, there are only a few attractions which offer the quality and enjoy the profile and visitation levels necessary for them to be classed as **regionally significant**. These include Butchart Gardens, the Royal British Columbia Museum, double decker bus tours, the Chemainus murals, and whalewatching tours. There are numerous other attractions located in the south and central portion of the Region that provide a unique experience for visitors.

Outdoor recreation includes activities based on the region's physical resources. The key activities pursued include sports fishing, boating, golfing and skiing. Other high-quality but more specialized recreation activities include scuba diving, kayaking, windsurfing and caving.

The issue of transportation is particularly important because the region contains a major island plus many smaller islands, and a rugged area of the central coast. The region is accessed by one of the largest ferry fleets in the world (BC Ferries). It also has rail service between Victoria and Courtenay (E and N Railway) and a variety of airports. The main north-south highway is being upgraded to a four-lane expressway between Victoria and Campbell River.

MARKET ASSESSMENT

Approximately two million visitor parties toured or visited the Vancouver Island/Coast Region in 1989. Of that number, 920,000 were non-British Columbia visitor parties and 1.1 million were British Columbia parties. The total number of actual visitors is in excess of five million annually.

The average party size is 2.6 persons while the average length of stay is 3.2 nights. Of all visitors to the region, approximately two-thirds visit Victoria. Total revenue generated by these tourists to and within the region is approximately one billion dollars (based on 1989 figures).

Touring is the main purpose of the trip for most visitors to the region (46 per cent). In terms of activities pursued, the most popular are sightseeing, shopping, beach or lake activities, visiting friends and relatives, and visiting parks or gardens.

The most common party composition is two adults, while families (travelling with children) represent only one party in seven. The summer is the most popular season to visit the region with nearly four out of 10 trips taken during this period. Spring and fall both attract relatively high number of visits at 28 per cent and 23 per cent of the total, respectively.

Observed market profile trends in the region include an increase in the number of European and Japanese visitors, growth in shoulder-season tourism, an increase in outdoor adventure, and an increase in the proportion of senior or retired persons. Other noticeable trends include an increase in seminar and conference activity, an increase in marine-based activities, and an increasing split between those willing to pay for quality facilities and the budget-conscious.

In terms of the future outlook for tourism, a series of trends will likely influence the character of tourism through the 1990s These include a move towards themed vacations and educationally oriented vacations, as well as increased expectations of quality and more four-season activities.

REGIONAL TOURISM INITIATIVES

A number of issues will affect the future development of tourism in the region. This section briefly identifies the issues and potential solutions.

- Inadequate transportation links should be strengthened by pursuing and supporting the recommendation of the Region One Transportation Task Force to continue the much-needed improvements to the Island Highway, and the construction of the new Inland Freeway from Parksville to Campbell River. Other important issues to address are the Valley Link Highway, expanded passenger rail service, improved coastal water transportation links, and increased Vancouver Island/mainland ferry sailings.

- There is a need for a more streamlined bureaucratic process and to rationalize a single set of development and tourism boundaries.

- The benefits of tourism to communities should be quantified. Wide distribution of this report will assist.

- There is a lack of co-ordination by tourism agencies. Standardized travel counsellor training and more refined marketing strategies are required.

- Financial support for tourism could be improved through better preparation of business plans by operators, lending institutions becoming better informed concerning tourism's requirements, a provincial low interest loan program, and expanded cost-shared funding for development planning.

- Travel costs and high taxes are major concerns to the industry. These concerns could be alleviated by a reduction in taxes on accommodation and gasoline.

- There is need to determine the appropriate responsibility for funding at the local government level. Better co-operation and information-sharing between all agencies is required.

- Current and future resource-use conflicts can be mitigated through expanding primary industry tours and developing an integrated resource mapping program.

- Looting of archaeological sites is a concern in the region. This could be addressed by informing the public of the need to respect these sites, monitoring the access to sensitive sites through a "watchman program", and ensuring adherence to Archaeological Branch guidelines.

- Inconsistent quality of facilities, services and training could be addressed by improving the availability of operator training courses, emphasizing hospitality training and developing a uniform accommodation grading system.

- A number of communities lack the accommodation capacity and/or quality needed to service an increase in tourism in their area. Often financing for development or expansion is limited by an inability to attract the interest of financial institutions.

- Opportunities exist in a broad spectrum of accommodation types, including: full-service, four season destination resorts, small speciality facilities geared to adventure travellers, private and public recreation vehicle parks and campgrounds, and bed-and-breakfast facilities. As noted earlier, better preparation of business plans by operators, better informed financial institutions and a low-interest loan program could address some of the financing problems.

- The development of regionally unique point-of-interest signage should be considered.

- Anti-tourism attitudes in some areas may be alleviated by highlighting the economic value of tourism to communities and by preserving the region's unique resources and character from over development.

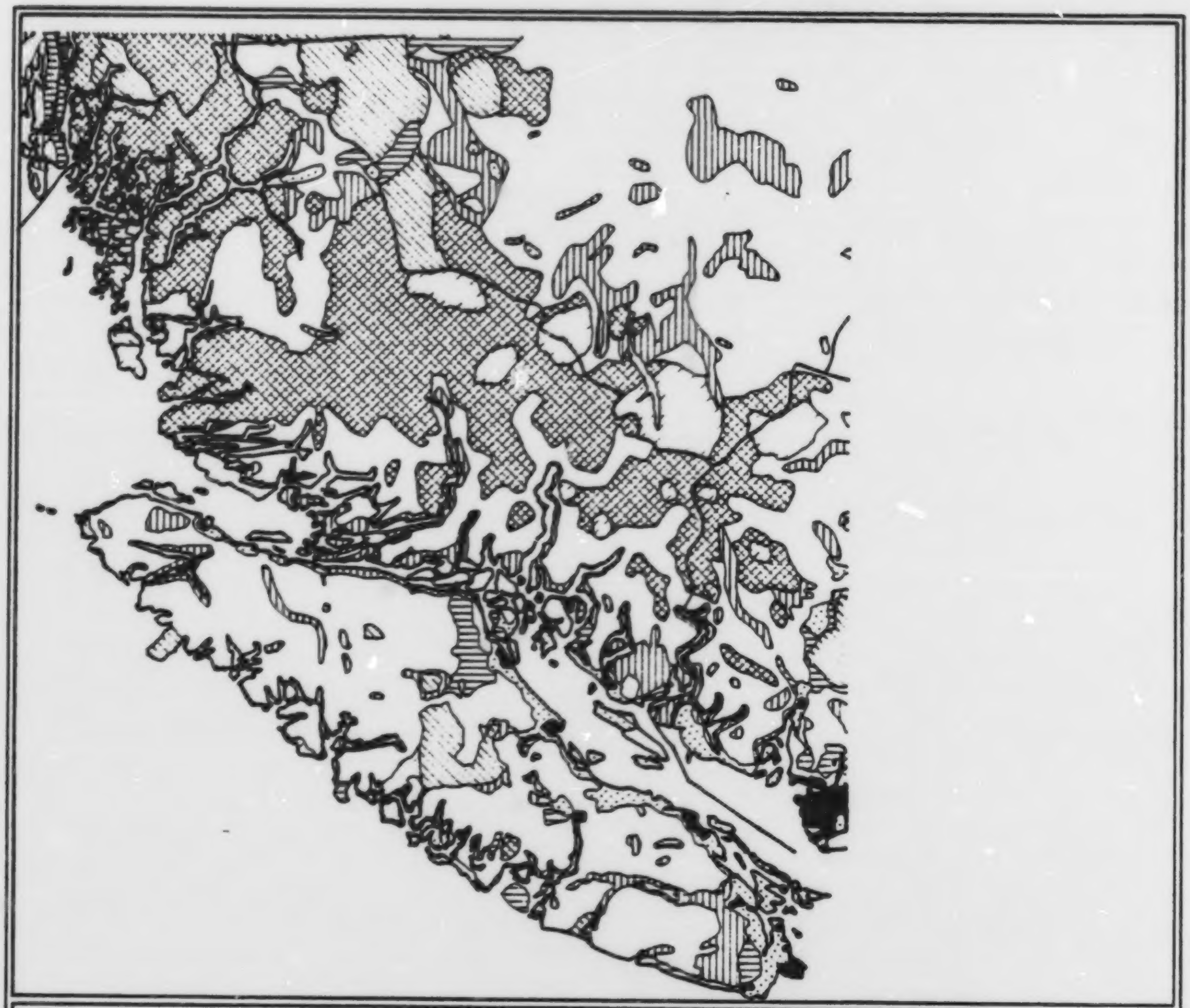
DEVELOPMENT THEMES/OPPORTUNITIES

The resource and market research led to the categorizing of development opportunities under a number of themes. Opportunities were divided into two groups: those considered the most important or key opportunities and other opportunities of less immediate or lower priority. In addition, the development themes were ranked against geographic areas within the region to determine the relative significance of each opportunity.

The themes and key development opportunities within the Vancouver Island/Coast Region are as follows (in alphabetical order):

DEVELOPMENT THEME	KEY STRATEGY
Arts, Crafts and Music	Encourage development and presentation of the region's arts, crafts and music industries through art and music festivals.
Eco-Tourism/Environmental Tourism	Develop eco-tourism through training of qualified guides guides, improving guiding, augmenting interpretive facilities facilities, improving wildlife viewing, and improving access.
Education Tourism	Develop elderhostel programs throughout the region.
Fishing	Encourage development of the proposed Fish Institute of Nanaimo. Enhance the region's freshwater sports fishing industry through lodge construction, improved access, guiding services and fish enhancement.
Golf	Develop the Vancouver Island/Coast Region as a world-class golf destination.
Heritage Tourism	Retain the E and N Railway and right-of-way to offer heritage tours during the summer and shoulder seasons (and ski commuter services in the winter). Capitalize on special historical events such as the Alexander Mackenzie Bicentennial and the arrival of the Spanish at Friendly Cove.

DEVELOPMENT THEME	KEY STRATEGY
Industrial Tourism	Develop farm holiday opportunities. Promote ongoing development of existing mine or forestry tours, including expansion of interpretive facilities and enhancing awareness of the Canfor steam train tours at Woss.
Marine and Waterfront Development	Build another marina in the Comox-Courtenay area. Support the proposed improvement of the Maple Bay Marina. Encourage the development of a seasonal pocket cruise ship industry.
Native Culture Tourism	Construct a native cultural centre and ecological museum in Bella Coola.
Outdoor Adventure Tourism	Enhance wildlife viewing and birdwatching opportunities. Develop kayaking and canoeing opportunities.
Skiing	Encourage the further development of Mt. Washington to include on-hill accommodation, four-season activities and a paved road.
Sports Tourism	Increase the number of high-profile sports events hosted in the Region.
Urban Tourism	Develop new attractions that reflect the heritage, marine location and/or scenic appeal of Victoria.



TOURISM LAND RESOURCES OF BRITISH COLUMBIA

SCALE 1: 3600000

TOURISM ZONES

BACK COUNTRY / WILDERNESS ZONE

- ▨ High Capability - Preserved
- ☐ Moderate Capability - Unpreserved
- ▩ Other Remaining Wilderness

MID-COUNTRY / NATURAL ZONE

- ▤ High Capability
- ▥ Moderate Capability
- ☐ Low Capability

- ░ FRONT-COUNTRY/INTENSIVE ZONE
- ■ URBAN ZONE
- — DEVELOPMENT REGION BOUNDARIES

SOURCE: B.C. Ministry of Tourism
August, 1990

PRODUCED BY: Digital Resource Systems Ltd.
Nanaimo, British Columbia

GIS SYSTEM USED: TerraSoft

1.0 INTRODUCTION

1.1 BACKGROUND

The Vancouver Island/Coast Region comprises Vancouver Island, many smaller islands and an equally large adjacent portion of the mainland. Altogether, the region encompasses eight regional districts. The region has a variety of topographical features and natural resources which have contributed to its current popularity as a tourism destination. These include long, sandy beaches, glaciers, rolling hills and deep fiords, as well as some of the world's best fishing waters, best whale-watching opportunities and tallest trees.

These features and resources are complemented by a moderate climate and an array of man-made attractions, support services and facilities. Extensive investment has gone into developing the region's tourism industry. The success of these efforts has resulted in the tourism industry becoming a large component of the region's economy. Certain communities in the region have been particularly successful. Recently, Chemainus received national recognition as the "little town that did," while Victoria has been classed as one of the top 10 preferred cities in the world to visit and received top ranking for providing the most pleasant urban environment.

Many communities are going to great efforts to win an increasing share of tourism revenue. Although a number of these local efforts have been successful, it is recognized that the region lacks an overall plan for tourism development which addresses the opportunities for tourism in a regional context. The Vancouver Island/Coast Tourism Task Force was appointed to oversee the development of tourism development recommendations for the region.

Subsequently, the Ministry of Regional and Economic Development issued a call for proposals for a consultant/researcher to assist the task force by undertaking the research, statistical analysis, interviews, surveys, market reviews and public meetings. These steps were required to develop a plan which identifies market areas with potential and outlines a strategy which will allow a co-ordinated approach to tourism development.

1.2 OBJECTIVES

The overall purpose of this study is to "develop action-based tourism development recommendations for the Vancouver Island/Coast Region, based on the planning and development priorities of the Region." The development opportunities identified in this strategy are based on an assessment of resources, market demand and new tourism opportunities. This main objective comprises a number of specific goals:

- to establish a tourism "vision" for the region;

- to identify high-potential tourism development opportunities which can be pursued by the region, given infrastructure requirements and resource limitations;

- to improve the ability of the tourism industry to contribute to the stability of the regional and local economies;

- to provide guidelines for tourism development which take advantage of opportunities while encouraging careful planning, rational utilization of resources, and protection of the environment and quality of life;

- to provide usable recommendations which emphasize achievable goals and give directions regarding the responsibilities of the various levels of government, tourism organizations and the private sector;

- to strengthen the tourism appeal and overall `destination' reputation of the region through development and promotion of a regional identity, without sacrificing emphasis on the unique features and strengths of individual communities;

- to identify and enhance the region's unique qualities without duplicating what other areas are doing; and

- to ensure the region's tourism industry meets visitor needs.

1.3 METHODOLOGY

The method employed to develop the Vancouver Island/Coast Strategy involved several methods of obtaining of information:

- secondary research and review of approximately 90 tourism-related Vancouver Island/Coast documents;

- interviews throughout the region with 80 individuals in the industry at community, local and provincial government, association and operator levels;

- field investigations and reconnaissance throughout the region;

- Ministry of Tourism market data from the Vancouver Island Tourism Monitor, Victoria Exit Survey, Visitor '79 Survey, Visitor '89 survey specific to the VancouverIsland/Coast Region, Statistics Canada, Central Statistics Bureau, and Vancouver Island Tourist Profile surveys;
- Workshop sessions with the Vancouver Island/Coast Tourism Task Force; and
- Eight open houses or public meetings in communities throughout the region.

The analysis involved creation of a tourism resources and services inventory, identification of societal and travel trends affecting the Vancouver Island/Coast tourism industry, identification of the strengths and weaknesses of tourism in the region, and market opportunities in terms of both existing and potential markets.

A series of open houses and public meetings were held in communities throughout the region. The purpose of these sessions was to elicit recommendations from interested persons regarding tourism development opportunities in the region. A questionnaire was distributed during these meetings. Of about 258 attendees at the eight sessions, approximately 51 filled in and submitted the questionnaire for review. The questionnaire and a review of the participant's responses and submissions received, is shown in Appendices A, B and C.

Input from these public sessions was integrated with supporting tourism analysis to prepare a preliminary identification of the key tourism development opportunities for the region. This evaluation was reviewed by the Vancouver Island/Coast Tourism Task Force in a series of workshop sessions. Consensus from these meetings was used as the basis for developing descriptions of the immediate priorities for submission to government. Each development opportunity description includes an assessment of the scope of the opportunity, a review of the strengths and constraints, and recommendations on steps to be undertaken by the public and private sectors for implementation.

1.4 SCOPE AND FOCUS

This strategy identifies tourism development opportunities for the Vancouver Island/Coast Region. A tourist, for the purposes of this report, is defined as anyone visiting the region for non-business purposes or resident travelling within the region and staying away from home at least one night. This region comprises eight regional districts, and covers a somewhat different geographic area than the corresponding tourism region. The focus of the study is at the regional rather than individual community level, although identified opportunities may be either community-based or regionally based.

The level of detail of this strategy is oriented to the concept focus, rather than project-specific details. The strategy has been prepared as a thorough overview designed to provide communities with the information and guidance needed to set direction, determine priorities, and make spending and resource allocation decisions through the 1990s. It is expected that the Community Tourism Action Program sponsored by Tourism British Columbia can be used to pursue the opportunities and themes identified in this strategy at the local level. The key audiences for the strategy are tourism operators and associations, potential investors, and the provincial and local governments.

The study began in June 1990. Data collection and resource assessment occurred during the summer, incorporation of public input occurred in the fall, task force review and priority setting occurred throughout the winter and spring. The final strategy was completed in April of 1991.

As noted, this strategy is an attempt to increase the economic significance of the tourism industry in the Vancouver Island/Coast Region. However, this strategy is only a guideline. Its ultimate success rests on the degree to which individuals, communities and governments work together to ensure its implementation.

Furthermore, it needs to be recognized that while the benefits of a well-developed tourism sector can be significant, attaining this level of development takes time, money and commitment. As a result, it is necessary to view tourism development as an ongoing solution to a region's economic health. However, it is just as important to realize that the Vancouver Island/Coast Region possesses a wide range of high-quality, and even world-class, natural and man-made resources. Maximizing this tourism development potential in a manner which balances community needs, environmental protection, market demands and other industry concerns, requires careful assessment of tourism opportunities.

Although the themes and opportunities identified in this strategy may involve certain areas more than others, the overriding 'development' opportunity identified during this process applies to every facet of the industry. While major attractions and spectacular natural features may be a region's primary draw, it is the quality of related services and personal contacts which cement a visitor's perception of a region.

2.0 RESOURCE ASSESSMENT

This section identifies the tourism resources and services of the Vancouver Island/Coast Region. Combining this resource information with the tourism market research in Section 3 provides important strategy planning information. It serves as a means of distinguishing between primary and secondary resources, and assists in the identification of tourism development opportunities and priorities for the region.

2.1 RESOURCE CATEGORIES

For the purposes of this assessment, tourism resources or products have been separated into two categories: attractions and services. Attractions include the natural and man-made features which attract visitors to the area or entertain them while they are in the region. Services are the ancillary elements or infrastructure required to service the travellers needs. The attractions are grouped into categories of:

Natural Resources
- Physical Features
- Flora and Fauna
- Parks

Commercial Attractions
- Family or Specialty
- Tour

Heritage, Art and Cultural Attractions
- Museums
- Heritage Structures and Sites
- Native Culture
- Industrial Heritage
- Art Attractions and Galleries

Special Events and Festivals
- Community Events
- Sports Events
- Music, Art and Theatre Events

The services are grouped as follows:

Recreation Services and Facilities
- Sports
- Activity and Tour Options
- Recreation Centres and Facilities

Transportation Services
- Highway
- Marine
- Air
- Rail

Accommodation Facilities
- Motels
- Hotels and Resorts
- Lodges and Fish Camps
- Public Campgrounds
- Private Campgrounds

Food Services
- Fast Food
- Family
- Fine Dining

Because this strategy is aimed at improving the overall tourism profile of the Vancouver Island/Coast Region, the resources and services identified in the inventory are those deemed to be of **regional significance**. That is, those which play a role, or can be developed to play a role, in drawing more people to the region or in keeping them in the region longer. As a result, not every feature or service a community possesses will be listed. The inventory process which forms part of the Ministry of Tourism's Community Tourism Action Program will fulfil this function. Inventory information was collected through a review of existing reports, tourist brochures and other publications, interviews and site visits.

2.2 ATTRACTIONS

2.2.1 NATURAL RESOURCES

Based on inventory results and survey feedback, it is apparent that the region's scenic and wildlife resources are its primary tourism asset. The region boasts an impressive array of high-quality physical features ranging from rugged mountain wilderness areas and scenic pastoral landscapes to excellent beaches and lakes. Many species of common and more exotic plant and animal life inhabit the area, while a large number of regional, provincial and national parks have been established to protect some of the area's more outstanding scenic and wildlife features and resources. Numerous existing tourism activities and facilities have also been developed to complement or take advantage of these natural features. The resources listed under each of the three inventory headings in this attraction category – physical features, flora and fauna, and parks – reflect the strength of the region's natural assets.

- **Physical Features** [1]

The region is dominated by three major landforms: the Vancouver Island Mountains, throughout the largest part of the region; the southern Coast Mountains on the Mainland; and the Georgian Depression, forming a narrow strip of lowlands and islands on the east coast of Vancouver Island and on the opposite coast of the mainland.

The Vancouver Island Mountains run from Lake Cowichan in the southwest to Quatsino Sound in the north. This range is typified by high peaks, rounded uplands, and deep valleys, with very rugged and scenic topography. The highest peaks are located in Strathcona Park (over 2,134 metres). Strathcona Park (227,000 hectares in size) offers large areas for wilderness camping, hiking, mountaineering, wildlife viewing and fishing. Other attractions in the park include wildflower-covered alpine meadows, glaciers, and Della Falls – the highest falls in Canada with a drop of 440 metres in three cascades.

The west coast of Vancouver Island is deeply fiorded, and island-dotted. The 72 kilometre West Coast Trail is a nationally significant recreational hiking route. The Nitinat Triangle is another popular back-country area, particularly for kayaking and canoeing.

Numerous inlets along the west coast, extending from 20 kilometres to 50 kilometres inland, provide harbours for recreational craft where excellent boating and salmon fishing take place. The rugged fiord coast between Clayoquot Sound and Quatsino Sound has a narrow coastal plain, with isolated sand beaches separated by dramatic headlands, offering such diverse activities as sports fishing, coastal cruising, skin-diving, and spelunking in limestone caves and caverns.

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[1] Excerpts from The Vancouver Island Tourism region, Tourism Industry Subsidiary Agreement (updated).

The Long Beach section of the Pacific Rim National Park contains the most easily accessible extensive area of sand beach on the west coast of Vancouver Island, providing swimming and surfing in the summer, and intertidal sea-life viewing year-round. The spring grey whale migration is an increasingly popular attraction.

Vancouver Island also has a number of large lakes: Nimpkish and Schoen lakes in the north; Buttle Lake in Strathcona Park; Kennedy (Vancouver Island's largest lake), Great Central, and Sproat lakes near the Alberni Valley; and the Nanaimo and Cowichan lakes in the southeast. These lakes are used to varying degrees for boating, swimming and fishing.

The portion of the mainland within the Central Coast Regional District includes inlets, islands and channel extensions of the fiord systems of the Southern Coast Mountains. The shoreline is rocky and rugged with heavily forested slopes providing opportunities for water-based activities such as boating, fishing and scenic viewing, and land-based activities such as mountain-climbing and hiking.

The northern tip, east coast and southern tip of Vancouver Island and the mainland coast surrounding Powell River are different from the remainder of the region. These areas consist of coastal lowlands, peninsulas, and numerous islands dotting the Queen Charlotte, Johnstone, Georgia and Juan de Fuca Straits.

The focal point of the northern tip of Vancouver Island is Cape Scott Park, a 14,880-hectare rugged coastal wilderness with rock promontories, headlands and sand beaches. Tourism activities in this portion of the region include outdoor recreation, fishing, hiking and wildlife viewing.

The east coast of Vancouver Island consists of coastal lowlands rising to forested uplands and mountains away from the shoreline, with scenic views of the island-dotted Strait of Georgia. This coast is a popular area for ocean-based recreation such as scuba diving, sports fishing, sailing, cruising and swimming. Inland recreation activities include camping, freshwater swimming, wildlife viewing, hiking, horseback riding, and mountain biking.

The southern portion of Vancouver Island has a mixture of rugged landscapes (the Malahat), pastoral landscapes (the Saanich Peninsula and the Cowichan Valley), scenic shorelines and island-dotted landscapes. Although much of the tourism trade to this area focuses on the man-made attractions, many visitors travel to this area because of the wide variety of activities provided by the coastal location.

The climate of the region is tremendously varied. Vancouver Island has the most temperate climate in Canada on its southern tip. Victoria has an average daily temperature ranging from a low of 4.1°C in January to 15.4°C in July. Victoria is also one of the sunniest spots in Canada, averaging over 2,000 hours annually. The central section of the region generally experiences considerably warmer summers and colder winters. The region also has some of the wettest spots in Canada, with Tofino receiving over 3200 millimetres (125 inches) of rain annually.

- **Flora and Fauna**

The heavy precipitation and moderate temperatures have developed the famous Pacific Coast rainforest with huge, old trees. Common species found in the region include the hemlock, Douglas fir, balsam, Sitka spruce, Garry oak, arbutus and red cedar. The Douglas fir has dense and productive stands, which have been subject to logging for many decades. Sitka spruce is the dominant species adjacent to the west coast of Vancouver Island. The southern, drier portions of the region are home to the Garry oak and the arbutus, species unique to this portion of the province.

Much of the old-growth forest has been logged, except in parks, reserves and less accessible valleys. The best examples of accessible virgin rain forest are found in several parks, such as Pacific Rim National Park, Elk Falls, Strathcona and Carmanah provincial parks, and the MacMillan provincial nature parks (Cathedral Grove). British Columbia's tallest trees are nearly 100 metres in height. The oldest trees (cedar and fir) are estimated to be between 1,200 and 1,500 years old.

The range of habitats in the forested mountains, uplands, lowlands and coast areas provide a diverse range of animal populations. The only species unique to the Island is the Vancouver Island marmot which inhabits meadows in the alpine and subalpine zones in the Nanaimo River Watershed. It is considered an endangered species.

Vancouver Island is also inhabited by small populations of Roosevelt elk and Columbia blacktail deer. Other large ungulates such as the mountain goat, white-tailed deer, mountain sheep, moose and caribou are found in the mainland portion of the region. Several large carnivores are also found in the region, including black bear and cougars. Grizzly bears do not inhabit the Island but are found in the central coast portion of the mainland.

The interface of terrestrial and marine ecosystems that occur along the coastline provides the region with a unique resource. The intertidal zone is home to a variety of shellfish, plus anemones, starfish, and crabs as well as shore birds.

Grey whales travel up and down the west coast of Vancouver Island during their twice yearly migrations. Humpback whales frequent open coastal waters and sometimes enter the Strait of Georgia during the summer. Other notable marine mammals that inhabit the coastal areas include dolphins, sea otters and both transient and resident killer whales. Fur seals, harbour seals and northern California sea lions are also common.

Sea birds abound, including cormorants, petrels, black oyster catchers, murres, murrelets and puffins. Inland birds include loons, grebes, great blue herons, black brant, Canada geese, mergansers and several species of ducks. Another notable feature is that about one-half of the world's population of trumpeter swans winter along the west coast of Vancouver Island. The region is also noted for high densities of bald eagles.

The region has a considerable variety of freshwater and saltwater fish which annually attract large numbers of anglers. The region is noted for all five salmon species (pink, chum, sockeye, coho, and chinook). In addition to salmon, the ocean waters of the region also have groundfish (lingcod, sole, flounder), and rock fish (grouper, sea bass). The most abundant freshwater sport-fish species are rainbow and cutthroat trout, steelhead, Eastern brook trout, brown trout, and smallmouth bass.

- **Parks**

The region offers a range of parks with a wide variety of landscapes and features. The park system is an important feature of the region's tourism product.

National Parks

There is one national park within the Vancouver Island/Coast Region. Pacific Rim National Park on the west coast of Vancouver Island attracts over 500,000 visitors each year. The main attractions of this park include Long Beach, the West Coast Trail, and the Broken Islands Group. The Long Beach portion contains highly developed areas with campgrounds, hiking trails, interpretive programs, and excellent beachcombing and sea-life viewing. The West Coast Trail is a 72 kilometres rugged hiking trail along the route of a former life-saving trail.

Provinçial Parks (Land-Based)

There are 90 land-based provincial parks in the region, ranging in size from one hectare at Petroglyph or Gabriola Sands parks to the 227,000 hectare Strathcona Park. Aside from the activities the provincial parks provide, they are important for their landscape and scenic protection roles, as well as for wildlife habitat preservation and interpretive values. These parks provide numerous opportunities for extensive and physically challenging activities such as hiking, climbing, kayaking, canoeing and nature study.

Marine Parks

The coastline of the Region has long been regarded as one of the finest boat cruising areas in North America. The Provincial Lands and Parks Ministry has established a system of 21 marine parks in the Region. They are mainly concentrated in the Strait of Georgia off the east coast of Vancouver Island.

Recreation Sites and Regional Parks

The British Columbia Forest Service also provides outdoor recreation campsites of an informal, rustic nature. These sites provide the visitor with opportunities to travel along the main logging routes and stop for a picnic or overnight stay. They are located throughout the region, but are concentrated around Cowichan Lake, Campbell Lake and the Salmon River watershed. There is also a large number of regional parks (163) established and maintained by the various regional districts. These are typically intended for local use.

EXHIBIT 2-1

NATURAL RESOURCES/ATTRACTIONS

REGIONAL DISTRICTS	PHYSICAL FEATURES	FLORA AND FAUNA	PARKS
Alberni-Clayoquot	Alberni Inlet/Flores Island Meares Island Hotsprings Long Beach Clayoquot Sound Broken Group Island West Coast Trail Mt. Arrowsmith Della Falls (access) Deer Group Islands Barkley Sound 37 stocked fishing lakes Beaches (generally) Hesquiat Peninsula	Marine mammals (ie., grey whales, dahl porpoise) Ungulets Seabirds Shorebirds Raptors	Seven provincial parks including one marine park Pacific Rim National Park Two regional parks
Capital Regional District	Numerous Beaches Generally attractive scenery - Mountain views - Seascapes - Pastoral 20 stocked fishing lakes	Seabirds Shorebirds Ungulets Marine mammals	9 provincial parks including one marine park Fort Rodd Hill National Historic Park/Site 17 regional parks
Central Coast	Ptarmigan Lake Rainbow Ridge Hotsprings Waterfalls Hanging glaciers Rugged wilderness Saloompt Forest Trails Numerous lakes Lonesome Lake	Cougar Marine mammals Ungulets (ie., mountain goats) Grizzly bears Fur-bearers Raptors Shorebirds	One provincial park Two regional parks (applying for a third) Alexander Mackenzie Park and Trail
Comox-Strathcona	Seymour Narrows Valley of 1000 Faces Caves Nootka Sound inland waterways Glaciers Ocean setting Ripple Rock Lookout 41 stocked fishing lakes Numerous beaches Kyuquot Sound	Seabirds Shorebirds Ungulets Fur-bearers Bears Mitlenutch Island and Bird Sanctuary	11 provincial parks including four marine and one recreation area 4 regional parks (5 other parks in various stages of application/development)

REGIONAL DISTRICTS	PHYSICAL FEATURES	FLORA AND FAUNA	PARKS
Cowichan Valley	West Coast Trail Carmanah Valley Nitinat Triangle/Lake Demonstration Forest Cowichan River/Lake Skutz Falls Pastoral setting 16 stocked fishing lakes Walbran Valley Mt. Prevost Numerous beaches	Seabirds Shorebirds Ungulets Raptors Wildflower reserve	9 provincial parks including one marine 37 regional parks Pacific Rim National Park
Mt. Waddington	Demonstration Forest Mt. Cain Caves 280 lakes (21 stocked) Beaches Nimpkish Island Robson Bight Ecological Reserve Mt. Waddington	Raptors Marine mammals (killer whales, seals) Fur-bearers Ungulets Seabirds Bears Robson Bight Ecological reserve	Five provincial parks including one marine park and one recreation area 8 regional parks
Nanaimo	Beaches Caves General scenery Ocean views 21 stocked fishing lakes	Marine mammals (sealions) Seabirds Fur-bearers Ungulets Raptors Buttertubs Bird Sanctuary Morrell Nature Sanctuary Marshall Stevenson Wildlife Preserve Nanoose-Bonnell estuary Little Qualicum estuary Englishman River estuary Wildlife Recovery Centre Arboretum	9 provincial parks including one marine park 87 regional parks
Powell River	Willingdon Beach Valentine Mountain Inland Lake Savary Lake Princess Louisa Inlet Diving sites Mountain views Ocean setting Powell Lake Desolation Sound Gateway Salmon Spawning Channel	Bears Ungulates Raptors Fur-bearers Seabirds Shorebirds Cranberry Wildlife Sanctuary	Two provincial parks including one marine park Four regional parks

REGIONAL DISTRICTS	PHYSICAL FEATURES	FLORA AND FAUNA	PARKS
Gulf Islands [1]	Shark Cove	Seabirds	25 provincial parks
	Camp Bay	Shorebirds	including 12 marine parks
	Teece Point	Raptors	
	Blunden Island	Ungulets	Two regional parks
	Spray Point - Tribune Bay	Marine mammals	
	Mt. Geoffrey		
	Archeological sites		
	Ecological reserves		
	Mt. Maxwell		
	Rebecca Spit		

2.2.2 HERITAGE, ART AND CULTURAL ATTRACTIONS

This is an extensive category covering museums, heritage structures and sites, native culture, industrial heritage and art galleries. The Vancouver Island/Coast Region boasts numerous quality attractions in this category. As Exhibit 2-2 indicates, some areas enjoy a wider range of heritage, art and cultural attractions than others, but generally the region's resources in this category are impressive.

As with natural and commercial attractions, development of the region's heritage, art and cultural attractions are inhibited by tourist traffic levels, access, and related support services. It is easier to develop one of these resources in an urban area, as traffic flow and resulting visitation justify development expenditures and ancillary services are already available. Conversely, a number of significant resources in more rural areas have yet to be developed because traffic volumes will not justify development and operational costs. Specific examples of this include the Fort Rupert Hudson's Bay Company fort site and the Suquash Mine site, both located in the Mt. Waddington Regional District.

- **Heritage Attractions**

  In addition to the world-class Royal British Columbia Museum, the region has numerous community museums housing high-quality displays of local heritage. The region's history centres around maritime travel and industry, railways, coal and gold mining, forestry, native prehistory and settlement, European exploration and agriculture. This is well represented by numerous heritage structures and sites, such as heritage homes, schools, churches, equipment, and industrial and native structures, many of which have been tastefully and carefully preserved or reconstructed. A number of these resources or sites have yet to be developed for interpretive purposes. This is especially true for the industrial heritage sites.

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[1] Gulf Islands is not a Regional District. The term has been used to reflect the area of Island Trust jurisdiction.

The heritage attractions identified in Exhibit 2-2 represent only those deemed to be regionally significant. The Ministry of Municipal Affairs, Recreation and Culture has completed a study which presents, in detail, the numerous heritage resources in the region. Victoria has the greatest concentration of heritage resources and structures in the region. Many of these are operating as tourist attractions (i.e., Craigflower Manor, and Craigdarroch Castle). Other significant heritage areas or sites include Ladysmith's revitalized heritage area and Railway Museum, the Powell River "Mill Town" area, the Nanaimo Bastion, Newcastle Island, the Alexander MacKenzie Heritage Trail and Fort Rupert.

A significant development in the area of industrial heritage has been the establishment of the Cowichan Valley Ecomuseum. Originating in Europe, this Canadian pilot project has received substantial federal and provincial support and is in its third year of operation.

- **Native Culture**

Native culture tourism refers to the use of the region's native cultural resources to draw visitors. Like heritage, native culture tourism can be broadly defined to include native history, art, festivals, artifacts and culturally significant structures. Native culture can be interpreted for visitors in many ways. These include art galleries, festivals, and museum displays, plus certain activity opportunities such as native fishing techniques and canoe racing.

During the past few years, the region's native community has become increasingly involved in the tourism industry. This involvement ranges from the management and operation of campgrounds, gift shops, and art galleries to the organization of special events and the development of attractions focusing on native culture.

The promotion of native culture has coincided with an increase in public interest regarding native art and traditions. This is based on the richness and diversity of the native culture in the region. The profile of the region's native culture has been further enhanced by the national and international reputation of a number of the region's native artists.

- **Art and Crafts**

The Vancouver Island/Coast Region is also well known for the high-quality work of local artists and craftpersons. This is reflected in the large range of studios and art galleries in the region. Particularly well represented is the work of potters, weavers, painters, sculptors and jewellers.

A number of communities have a thriving arts and crafts cottage industry. Particularly high concentrations of artisans live in the Comox Valley and on the Gulf Islands. As the purchase of locally produced, high-quality arts and crafts has traditionally been a favourite activity of visitors and residents alike, the potential to capitalize on this attraction is positive.

EXHIBIT 2-2

HERITAGE, ART AND CULTURAL ATTRACTIONS

REGIONAL DISTRICTS	MUSEUMS	HERITAGE STRUCTURES/ SITES	NATIVE CULTURE RESOURCES	INDUSTRIAL HERITAGE	ART ATTRACTIONS AND GALLERIES
Alberni-Clayoquot	Alberni Valley Museum	Two Spot Train Shipwrecks Tofino-Ucluelet Heritage Trail	Petroglyphs Hotsprings Cove Eagle Aerie Gallery Wickaninnish Centre	McLean Sawmill	Numerous galleries
Capital	Royal B.C. Museum Maritime Museum Sidney Whale Museum Metchosin School Museum Goldstream Region Museum Sooke Region Museum Saanich Pioneer Museum Aviation Museum	Ft. Rodd Hill Craigdarroch Castle Numerous designated heritage buildings Saanich Historical Artifacts Society Leechtown Chinatown	Thunderbird Park		Art Gallery of Greater Victoria Emily Carr Gallery Numerous smaller galleries
Central Coast	Bella Coola Museum	Alexander Mackenzie Heritage Trail Mackenzie Rock Archaeology sites	Totem Poles Petroglyphs/Pictographs Bella Bella Cultural Centre	Canneries Ocean Falls	
Comox-Strathcona	Campbell River Museum/Archives Link and Pin Museum Kwagiuth Museum Courtenay Museum Comox Airforce Museum Cumberland Museum	Heritage buildings Heritage farm sites Filberg Lodge	Heritage Park Longhouse Totem Poles Native Sons Hall Museum Indian burial grounds	Gold mines (Zeballos) Iron mine(s) Silver mine (Silverado Creek) Hisnit Marble Quarry	Ten galleries Numerous studios
Cowichan Valley	Ecomuseum Forest Museum Railway Museum Kaatza Station Historical Museum Cowichan Maritime Museum Black Nugget	Heritage buildings Shawnigan Lake Resort Butter Church Paldi	Native Heritage Centre Totem Poles Butter Church (Native dancing etc.)	Ecomuseum Forest Museum Chemainus Water Wheel Heritage Lumber Mill Kinsol Trestel	Chemainus Murals Numerous galleries
Mt. Waddington	Pt. Hardy Museum and Archives Alert Bay Museum and Archives Sointula Finnish Museum	Fort Rupert Historical Anglican Church (Numerous) heritage farm sites and homesteads	Fort Rupert Band U'Mista Cultural Centre Native burial grounds Big House (Kwakiutl) Tsulquate Longhouse Hunt Coppermaker Shop World's tallest totem	Whaling station World's largest burl Hornsby Steam Tractor Suquash Mine Site Benson Lake Mine Site Telegraph Cove Lumber Mill Canfor steam train	Hunt Coppermaker Shop
Nanaimo	Craig Heritage Park and Museum Nanoose Museum Nanaimo Centennial Museum Old Power House Museum Vancouver Island Military Museum	The Bastion Heritage walk St. Ann's Anglican Church Locie 1066 Nanaimo Court House	Petroglyphs	Newcastle Island	Six art galleries
Powell River	Powell River Historic Museum Logger Museum	Village of Lund Mill Town	Sliammon Village	Limestone quarries Antique logging equipment	Eight art galleries/ craft shops
Gulf Islands	Mayne Island Museum	Spirit of Chemainus Heritage Homesteads		Petroglyphs	Dandelion Gallery of Fine Arts

2.2.3 COMMERCIAL ATTRACTIONS

This section covers those attractions which cannot be classed as Heritage, Culture, Art or Special Events. To distinguish between fixed structure or site attractions and those involving touring, this category is divided into family or specialized attractions, and tour attractions for which, in most cases, a fee is charged. There is some overlap between the tours identified in this category and those included under recreation facilities and services, given that tours are both an attraction and a service.

Commercial attractions are generally built structures designed around a particular theme. The larger, high-quality facilities are capable of attracting visitors to the region, while most rely on the drawing power of the region or community. The majority of commercial attractions in the region are clustered in the Greater Victoria area. The number of commercial attractions generally decreases as population and tourism traffic decreases.

There are two criteria for assessing the strengths and weaknesses of the region's commercial attractions: quality and number of visits. There are only a few attractions and tours which offer the quality and enjoy the profile and visitor levels necessary for them to be classed as **regionally significant**. These include Butchart Gardens, the Royal British Columbia Museum, double-decker bus tours, Chemainus murals, whalewatching tours and, to a lesser extent, the other Victoria-based attractions such as Sealand, Miniature World, Fable Cottage, the Wax Museum and the Undersea Gardens.

There are several other commercial attractions which offer a quality experience and have successfully developed their own market niche but currently lack the profile and/or capacity to play a major role in the region's tourism industry. These include Whippletree Junction (Duncan), Butterfly World (Coombs) and Paradise Adventure Golf (Parksville).

As is noted from the themes and resources upon which attractions have been developed, there is a tremendous range. The consistent feature is that they are based on a physical resource and/or are located in a "tourist" area.

EXHIBIT 2-3

COMMERCIAL ATTRACTIONS

REGIONAL DISTRICTS	FAMILY/ SPECIALTY	TOUR
Alberni-Clayoquot	Harbour Quay Mars Water Bombers Canadian Princess Resort	M.V. Lady Rose Circle tours Whalewatching tours Hotsprings tours Kayak tours Naturalist tours Sail charters Forest tours/interpretive centre Hatchery tours
Capital	Sealand Undersea Gardens Miniature World Butcharts Gardens Fable Cottage Wax Museum Royal Roads Waterslides Crystal Gardens Beacon Hill Park Parliament Buildings Ann Hathaway's Cottage Dominion Observatory	Double-decker tours Tally Ho Carriage tours Numerous sightseeing and tour bus options Harbour/cruise tours Walking tours Sail charters Forest tours
Central Coast	—	Hatchery tours Forest tours
Comox-Strathcona	Mini golf	Air tours Mill and Mine tours Hatchery tours Cruises Forestry interpretive centre

REGIONAL DISTRICTS	FAMILY/ SPECIALTY	TOUR
Cowichan Valley	Satellite Earth Station Glass Castle World's Largest Hockey Stick Whippletree Junction	Environmental tours Ecomuseum tours Forest and mill tours
Mt. Waddington	—	Harbour tours Woods and mill tours Hatchery tours Bike tours Charter tours Helicopter tours/fishing Caving tours Whale watching tours
Nanaimo	Butterfly World Newcastle Island Karlin Rose Garden Coombs Country Market Mini golf Bungy jumping Petting zoo	Harbour tours Variety of air/bus tours Fish Hatchery tours Forest tours Sea lion tours Pulp mill tours Biological station tours
Powell River	Petting farm	Freshwater and salt-water Canoe tours Combination outdoor/adventure tours Heli-fishing or adventure tours Cruise/sail charters Sunshine Coast circle tours Mill tours
Gulf Islands	—	—

2.2.4 SPECIAL EVENTS AND FESTIVALS

This category covers specialized community, sport or music, art and theatre events. Although hundreds of these events are held throughout the region, only the more significant ones have been included in the inventory. With some exceptions, few of these events play a major role in drawing visitors to the region. Most are aimed at encouraging local participation or providing entertainment and might encourage visitors already in the area to stay longer. Special events which play a more major role in drawing outside visitors include the Pacific Rim Whale Festival (Tofino), Swiftsure (Victoria), Festival of Murals (Chemainus), Bathtub Races (Nanaimo), Dixieland Jazz Festival (Victoria), and the Kathaumixw International Choral Festival (Powell River).

It is likely that given adequate promotion, the region's tourism industry will benefit from the impact of Music '91, the 1991 Cowichan Winter Games, and the 1994 Commonwealth Games, by providing events on which the region can focus.

The tourism potential of special events is currently limited by the lack of scheduling co-ordination. Because similar events are often held in different communities at the same time, visitors who might like to take in several events are unable to do so.

Special events can form an important component of the region's tourism industry because of the increasingly specialized focus of today's tourist. Depending on quality and awareness, people will travel great distances to observe or participate in special events. Exhibit 2-4 lists the key special events in the region. Although many other than those listed are popular, the majority of spectators are local residents.

EXHIBIT 2-4

SPECIAL EVENTS AND FESTIVALS

REGIONAL DISTRICTS	COMMUNITY EVENTS	SPORTS EVENTS	MUSIC/ART/ THEATRE EVENTS
Alberni-Clayoquot	Fall fairs and logger sports Salmon festival/derbies NHL Salmon Derby Ukee Days Pacific Rim Whale Festival Octoberfest Funshine Show Quay Christmas Sailpast	Golf tournaments Water Festival of Sports Numerous team sports	Folk Fest Pacific Rim Arts Festival
Capital	Classic Boat Festival May Day Parade Folk Fest All Sooke Day/logger sports Saanichton Fair Sidney Christmas Sailpast Air show	Swiftsure Vic-Maui Race Royal Victoria Marathon Golf tournaments 1994 Commonwealth Games	Dixieland Jazz Festival Classical Music Festival Painter's Guild Show Various jamborees, exhibits, art shows, music festivals
Central Coast	Fall fair	Bella Coola Rodeo	
Comox-Strathcona	Mt. Washington Springfest Salmon derbies Logger/mining sports Nautical Days Sand Castle Contest Salmon Festival Empire Days Air show	Snow to Surf Race Windsurf Regatta Various Ski tournaments Triathalon Golf tournaments	Youth Music Centre/Festival Festival of Arts Filberg Festival of Arts and Crafts
Cowichan Valley	Summer Festival Cowichan Indian Days Cowichan Exhibition Festival of Lights Dogwood Days	Drag boat races Youbou Regatta Waterski tournament Shawnigan Rowing Regatta	Festival of Murals Country Music Festival and Jamboree

REGIONAL DISTRICTS	COMMUNITY EVENTS	SPORTS EVENTS	MUSIC/ART/ THEATRE EVENTS
Mt. Waddington	Filomi Days Logger Sports Day Fishing derbies Sea Festival Salmon Days	Indian Sports Days	
Nanaimo	Empire Day Celebrations Highland Games Nanaimo Festival Sandcastle Competition Vancouver Island Exhibition Parksville Qualicum Brant Festival Sea Lion Festival	Bathtub Races Coombs Rodeo Hockey school World Croquet Championships Nanaimo Marine Festival	Shakespeare Plus Bluegrass Festival
Powell River	Sea Fair Folk Festival	Powell River/Comox Sailing Race Bike Rodeo	Kathaumixw International Choral Festival
Gulf Islands		"Round the Island" Sailboat Race	Hornby Festival

2.2.5 OUTDOOR RECREATION

A wide range of recreational services and facilities has been developed in the Vancouver Island/Coast Region for use by the travelling public. This category encompasses sports services and facilities, activity or tour options, and general recreation services and facilities.

Another key tourism strength of the region is the extensive range of activity options available. Visitors can enjoy a variety of water-based activities, plus excellent hiking, fishing, golfing, skiing, caving, etc. The availability and quality of facilities and services supporting these activities varies throughout the region and among activities. Urban areas are again more likely to offer a wider range of equipment rentals, tour options, and other facilities, while these services are less readily available in more rural areas. Conversely, the recreational activity is generally of a non-urban nature and is located outside the urban areas. The following is a description of the more significant forms of outdoor recreation.

- **Sports Fishing**

  Fishing refers to the activities associated with both salt-water and freshwater fishing. It also includes the range of related facilities and services available to anglers, including lodges, charter and guiding services, floating fishing camps and equipment rental and retail outlets, plus derbies and canning services.

  Salt water fishing is currently the region's most popular recreational activity. The range of services available to visitors is extensive and includes boat rental services, charter operations, rustic to full-service fishing lodges and air access fishing. More than 75 per cent of British Columbia's salt-water fishing lodges are located in the region. A weakness in the area of marine services is inadequate marina and docking facilities, especially in summer months.

  Freshwater fishing is also popular in the region, but is less well serviced than salt-water fishing. At present, freshwater fishing is more popular with residents than with tourists, while salt-water fishing has a stronger non-resident appeal (although B.C. residents still comprise the majority of salt-water anglers).

- **Boating**

  The coastline of British Columbia, especially the Strait of Georgia and Juan de Fuca Strait is regarded as one of the finest cruising areas in North America. The numerous islands, inlets, secluded anchorages, and thousands of square kilometres of both open and protected waters are a haven for thousands of sail and power boats.

To provide basic facilities for the boating public, the Provincial Parks Branch has established a system of marine parks, typically with safe anchorages and mooring buoys. Some marine parks have landing floats, others have campgrounds, and some have beaches and picnic tables. Outside of marine parks, there are numerous marina facilities which provide moorage, and services such as fuel, groceries, marine supplies, repair services and land-based accommodation.

- **Golfing**

Golf is one of the fastest growing participatory sports in North America. The 1980s produced the largest increase in the number of people playing golf, the number of rounds played, and the amount of money spent in the industry since the game was introduced to North America.

The construction of a number of new quality golf courses, such as Powell River, Storey Creek, Olympic View and Arbutus Ridge, has combined with the region's year-round golfing weather to promote the growing popularity of the region as a golfing destination. At present, there are 39 golf courses in the region, either in operation or under construction. Of the existing courses, 15 are 18-hole, while 22 are nine-hole. Approximately 13 per cent of all rounds played in the region are generated by tourists.

- **Skiing**

The Vancouver Island/Coast Region has four developed alpine and/or nordic ski areas. All four of these ski areas (Mt. Arrowsmith, Mt. Washington, Forbidden and Mt. Cain) are located on Vancouver Island. Of the four mountains, Mt. Washington has the most extensive facilities including four chairlifts, a five-month season, more snow than any other British Columbia ski area, and some of the best nordic trails in the Pacific Northwest. Mt. Washington caters to the second-largest ski market in the province after Whistler/Blackcomb.

Although the other areas are adequate for resident skiing, they lack the quality skiing opportunities which will make them competitive with Mt. Washington. Over 90 per cent of alpine skiers on Vancouver Island are from British Columbia, with the majority from the Comox Valley and Victoria.

Available data indicates that while alpine skiing has a higher profile, a significant number of people participate in nordic skiing. Ninety-five per cent of all nordic skiers on the Island are from British Columbia, with the Comox Valley and Victoria making up the majority.

- **Outdoor Adventure**

The rugged landforms and the variety of natural resources all in close proximity provide opportunities for a variety of outdoor adventure activities. Outdoor adventure can be defined as a leisure activity that takes place in an unusual, exotic, remote or wilderness destination, and that tends to be associated with high levels of involvement and activity by the participants. Growth in this sector has been increasing rapidly, while predictions of a 15 to 20 per cent future growth rate will see industry participation double within four or five years.

Recreational canoeing and kayaking is currently pursued in the Cowichan River, the Nitinat Triangle, Powell Lake, Bonanza Lake, the Klakama lakes, in the sheltered waters around the Gulf Islands and in the nearshore areas on the west coast of Vancouver Island. Whitewater canoeing and kayaking can be enjoyed on parts of the Nimpkish and Salmon Rivers and on the Campbell, Elk and Gold rivers. Surfing is pursued in the Long Beach area, while windsurfing takes place in many lakes, most notably Nitinat Lake.

Scuba diving in the cold clear waters of both the east and west coast of Vancouver Island is a growing activity. Local waters contain a large variety of animal and plant life, offering the world's most diverse underwater scenery. There are also numerous wreck diving opportunities.

Mount Waddington and mountains in Strathcona Park offer top-quality rock climbing, mountaineering and glacier hiking. Forbidden is a favourite area for alpine wilderness backpacking. Hiking is enjoyed throughout the region, and the Bella Coola valley in particular attracts European outdoor enthusiasts. Mountain biking and trail riding are also popular outdoor activities.

An activity that has attracted considerable recent interest is caving or spelunking. Horne Lake Caves Provincial Park near Qualicum has three caves that are open to visitors. There are several others, notably Euclataws Cave which has restricted access to protect the high-quality stalactites, and stalagmites.

- **Other Activities**

In addition to the previously mentioned tourism products, there are other recreation activities which are offered within the region. Although operators are limited in number of operators, these products all contribute to the region's diversity of tourism product.

Public attention regarding environmental issues is growing and will likely continue to gain momentum. The region has a wide variety of unique environmental characteristics and areas which could be promoted for tourism purposes. These range from tours of old growth forest to nature observation to wildlife viewing.

Sporting events, as a tourism activity, are being recognized as a viable component of the region's tourism product. Many of the region's communities have been hosting sporting events on an organized and casual basis for years. More recently, various sporting interests have been successful in drawing events to the region which are of national and international significance. These include the Canadian Curling Championships, Skate Canada, and the International Softball Championships. The economic activity generated by such events is significant.

EXHIBIT 2-5

RECREATION SERVICES/FACILITIES

REGIONAL DISTRICTS	SPORTS	ACTIVITY/ TOUR OPTIONS	RECREATION CENTRES/ FACILITIES
Alberni-Clayoquot	Fish charters Mt. Arrowsmith Three golf courses Recreation centre	Circle tours Mill/Forestry tours Kayaking/canoeing Stormwatching Whalewatching Hiking Fish hatchery tours Freshwater and salt-water fishing Camping Skiing Windsurfing	Marinas Campgrounds/RV parks Fish cannery Mt. Arrowsmith
Capital	Fish charters Eleven golf courses Western Speedway Diving charters Several recreation centres Arenas University sports facilities Rowing	Hiking trails Boating Numerous sightseeing/ tour options Freshwater and salt-water fishing Camping Diving Forestry tours Windsurfing	Complete marine services and facilities Many marinas Boat rentals Campgrounds/RV parks
Central Coast	Fishing charters	Hunting Whalewatching River rafting Trail riding Hiking/backpacking Routes Logging tours Fish hatchery tours Freshwater and salt-water fishing Camping	Campground
Comox-Strathcona	Fishing charters Recreation centre Skiing Saratoga Raceway Six golf courses Discovery Pier Arenas	Alpine hiking Caving Kayaking/canoeing Hiking Diving Freshwater and salt-water fishing Mill tours Mine tours Fish hatchery tours Skiing Trail riding Windsurfing	Discovery Fishing Pier Numerous marinas Boat rentals Campgrounds/RV parks Discovery Harbour Mt. Washington Forbidden Plateau
Cowichan Valley	Freshwater fishing lodges Five golf courses Waterski Slalom Course Arena Recreation centre	Hiking Trails Canoeing/kayaking Marine tours Bus tours Forestry tours Camping Waterskiing Freshwater and salt-water fishing Windsurfing	Marinas Campgrounds/RV parks

REGIONAL DISTRICTS	SPORTS	ACTIVITY/ TOUR OPTIONS	RECREATION CENTRES/ FACILITIES
Mt. Waddington	Charter operators Fishing lodges Helicopter fishing Mt. Cain Two golf courses Diving charters Pool complex	Skiing Diving Caving Forestry tours Whalewatching Canoeing/kayaking Nature/hiking trails Fish hatchery tours Freshwater and salt-water fishing	Marinas Campgrounds/RV parks Mt. Cain
Nanaimo	Saltwater fishing charters Diving charters Four golf courses Recreation centre Arena	Camping Caving Diving Hunting Hatchery tours Windsurfing Freshwater and salt-water fishing Hiking Mill tours	Marinas Campgrounds/RV parks
Powell River	16 Saltwater fishing charters Golf course (18-hole under development) Diving charters Recreation centre	Diving Mill tours Disabled adventure tours Canoe/kayaking Hiking trails Hatchery tours Freshwater and salt-water fishing Heritage tours Townsite sight/flightseeing tours	Marinas Canoe/boat rentals Campground/RV parks Inland Lake (for the visually and physically handicapped) Model community facilities Canoe route Bike rentals
Gulf Islands	Two golf courses	Hiking Bicycling Kayaking/canoeing	Marinas Boat rentals Canoe/kayak rentals

2.3 TOURIST SERVICES

2.3.1 TRANSPORTATION SERVICES

The provision of adequate transportation services is a critical factor in the overall success of the region's tourism industry. The issue of transportation is a particularly important one for the Vancouver Island/Coast region, as the area must deal with a number of natural transportation barriers. Both the Powell River regional District and the Island are separated from their major tourism markets by water, while the Central Coast area, (although part of the region) can only be accessed by road via the Cariboo, by private boat or by air. Because over 90 per cent of visitors to the region arrive by vehicle, the provision of adequate ferry services and an efficient road network is essential.

The province has one of the largest and most efficient ferry services in the world. However, ferry capacity and scheduling has become a significant challenge to tourism development in recent years. This is particularly true on the Sunshine Coast, the Gulf Islands and on the Port Hardy to Prince Rupert routes. Furthermore, scheduled ferry service to Bella Coola and the Central Coast does not exist.

Ferry capacity has not kept pace with increases in the number of tourists to the region, especially during the summer months. Even with the addition of new ferry crossings between Tsawassen and Nanaimo, summer season waits are expected on ferries between the Mainland and Vancouver Island. Recent decisions to reduce summer sailings between Nanaimo and Horseshoe Bay will increase the problem.

At present, the Vancouver Island portion of the region is undergoing extensive highway upgrading. Medium- and long-range plans will involve overall improvement and widening of the Island Highway south of Nanaimo, as well as development of an Inland Island Highway north of Nanaimo. A route from Lake Cowichan to Port Alberni and the Comox Valley is currently being examined for its feasibility by the Ministry of Transportation and Highways. These improvements will provide additional access and tourism development opportunities.

The region has adequate air facilities, as most smaller communities have access to a landing strip. There are, however, a limited number of scheduled flights to many of the region's communities. Furthermore, most connections between Vancouver Island/Central Coast destinations are through Vancouver, requiring a time-consuming layover and/or plane change.

The Esquimalt and Nanaimo Railway between Victoria and Courtenay is the only rail service in the region. It offers a unique and spectacular alternative to road and air connections between communities. However, its equipment and schedules do not lend themselves to quality tourism transportation. In addition, CPR has consistently attempted to abandon the route.

EXHIBIT 2-6

TRANSPORTATION SERVICES

REGIONAL DISTRICTS	HIGHWAY	MARINE	AIR*	RAIL
Alberni-Clayoquot	Island Coach Lines Orient Stage Lines	Alberni Marine Transportation M.V. Lady Rose	Pacific Rim Airlines Tofino Air	
Capital	Pacific Coach Lines Island Coach Lines BC Transit	Victoria Princess Victoria Clipper Blackball Transport BC Ferries (Vancouver and Gulf Islands) Washington State Ferries Cruise Ships	Air BC[1] Time Air[2] Helijet Airways Lake Union Horizon Air Canadian Airlines Harbour Air Burrard Air	E & N Railway
Central Coast	Cariboo West Stage Lines		Wilderness Airlines	
Comox-Strathcona	Island Coach Lines BC Transit	BC Ferries to Denman/Hornby Island,Powell River, Quadra and Cortez Island	Air BC[1] Time Air[2] Coval Air Air Nootka Waltair Vancouver Island Air	E & N Railway
Cowichan	Island Coach Lines	BC Ferries (Saltspring, Thetis and Kuper Islands)	Harbour Air	E & N Railway
Mt. Waddington	Island Coach Lines North Island Transportation	B.C. Ferries (Alert Bay and Prince Rupert)	Air BC Time BC Trans Provincial Airlines Orca Air Pacific Coastal Air Wag Air Wilderness Air	

REGIONAL DISTRICTS	HIGHWAY	MARINE	AIR*	RAIL
Nanaimo	Island Coach Lines Maverick Coach Lines BC Transit	BC Ferries (Vancouver, Gabriola and Lasquet Island) Newcastle Island Ferry	Thunderbird Air Baxter Air Time Air Air BC Burrard Air Pacific Coastal Air Tyee Air	E&N Railway
Powell River	Maverick Coach Lines BC Transit	BC Ferries (Comox, Texada Island and Sunshine Coast)	Air BC Pacific Coastal Air Sunshine Coast Air	
Gulf Islands		BC Ferries to all islands		

*The list includes the larger scheduled and charter airlines. Additional sightseeing air services exist.

[1] Air BC is the regional carrier for Air Canada.

[2] Time Air is the regional carrier for Canadian Airlines.

2.3.2 ACCOMMODATION SERVICES

Accommodation facilities in the Vancouver Island/Coast Region range from first-class, urban, full-service facilities to rural, unserviced forestry campsites. As the accommodation inventory indicates, the region has more than 14,400 units of roofed accommodation and more than 10,400 campsites. In each accommodation category, the number of available sites/units has increased significantly during the last decade.

The accommodation totals recorded on the following table are based on the 1990 B.C. Accommodation Directory and locally compiled inventory information. Because not all regional districts maintain an accommodations inventory and because many facilities are not listed in the Accommodations Directory, not all existing facilities are tabulated. However, Exhibit 2-7 illustrates a reasonably accurate tally of the tourist accommodations available in the region.

- **Hotels and Motels**

  The region offers a mixture of hotel and motel facilities. Although there are slightly more hotel rooms (7,050) than motel rooms (6,593) within the region, there are far more motel facilities in the region (253 versus 132). The average number of units for a motel in the region is 26, while for a hotel it is 53 units.

- **Bed and Breakfast Facilities**

  Bed and breakfast facilities are located in most communities in the region, with numbers ranging from a few to over 100. It is estimated that there are at least 250 bed-and-breakfasts in the region, and this sector is expected to continue to see significant growth in the future. There is a concentration of these facilities in larger population centres and getaway points. Victoria has developed the bed-and-breakfast sector to draw that segment of the market interested in a bed-and-breakfast experience. The bed-and-breakfast system in the Port Hardy and Port McNeill communities was developed to accommodate the overflow from local hotels and motels when the Queen of the North ferry docks in Port Hardy on alternate days.

- **Fishing Lodges**

  The region has several dozen fishing lodges, including several which service an exclusive clientele. Many are located in the north Island area with other concentrations in the Comox Valley, Alberni-Clayoquot area and the Central Coast. They offer a variety of amenities ranging from rustic wilderness camps to full-service, high-quality resorts.

- **Campgrounds and RV Parks**

Campgrounds also form a major component of the region's accommodation sector. Numerous public and private facilities provide travellers with destination and enroute campground facilities. The region has 25 government campgrounds with 1,783 sites. The private sector provides an additional 146 campgrounds with 8,487 sites.

- **General Issues**

The accommodation sector of the tourism industry is facing some serious issues which will directly affect its ability to meet the needs of visitors. A key issue affecting the accommodation sector is concern regarding taxes. Many facilities are in need of upgrading in order to remain competitive. Property taxes, the 8 per cent room tax, the 2 per cent municipal room tax (levied in the Victoria area), and the 7 per cent GST, place a burden on existing operations.

In addition, accommodation facilities in the less-populated regions and communities are very dependent on summer occupancy to offset lower levels the remainder of the year. These seasonal variations have resulted in a lack of willingness by the financial community to lend money to accommodation facilities for expansion and upgrading.

EXHIBIT 2-7

ACCOMMODATION FACILITIES

REGIONAL DISTRICTS	MOTELS		HOTELS/RESORT		LODGES/FISH CAMPS		GOV'T CAMP-GROUNDS		PRIVATE CAMP-GROUNDS	
	#	UNITS	#	UNITS	#	UNITS	#	UNITS	#	SITES
• Alberni-Clayoquot										
Port Alberni	12	301	7	214	—	—	—	—	9	556
Tofino	8	177	4	101	2	15	—	—	5	756
Ucluelet	7	139	2	97	1	6	—	—	2	140
All other areas	3	53	1	16	4	7	3	171	4	77
Total Regional District	30	670	14	428	7	28	3	171	20	1529
• Capital										
Colwood	2	44	—	—	—	—	—	—	—	—
Victoria/Oak Bay	21	1111	36	4099	—	—	—	—	—	—
Central Saanich/ Brentwood	4	137	1	30	—	—	—	—	1	176
Esquimalt	1	120	1	50	—	—	—	—	—	—
Metchosin —	—	1	14	—	—	—	—	1	85	
Saanich	19	842	1	115	—	—	—	—	—	—
Sidney/North Saanich	3	104	2	97	—	—	1	30	3	—
Sooke	2	20	3	28	—	—	—	—	3	199
View Royal 1	4	—	—	—	—	—	—	1	250	
All other areas	=	=	=	=	=	=	3	278	=	=
Total Regional District	53	2382	45	4433	0	0	4	308	9	710
• Central Coast (Electoral areas only)										
Bella Coola 2	42	1	22	1	15	—	—	1	10	
All other areas	1	20	1	20	6	129	=	=	=	=
Total Regional District	3	62	2	42	7	144	—	—	1	10
• Comox-Strathcona										
Comox Valley	15	495	6	281	—	—	—	—	7	351
Campbell River	17	526	2	109	4	107	—	—	8	299
Gold River 2	55	—	—	—	—	—	—	1	40	
Sayward	2	9	1	15	—	—	—	—	4	105
Tahsis	1	12	1	21	—	—	—	—	—	—
Zeballos	—	—	1	9	—	—	—	—	—	—
All other areas	13	211	=	=	2	28	4	491	10	619
Total Regional District	50	1308	11	435	6	135	4	491	30	1414

REGIONAL DISTRICTS	MOTELS		HOTELS/RESORT		LODGES/FISH CAMPS		GOV'T CAMP-GROUNDS		PRIVATE CAMP-GROUNDS	
	#	UNITS	#	UNITS	#	UNITS	#	UNITS	#	SITES
• Cowichan Valley										
Duncan/North Cowichan	6	227	1	34	—	—	—	—	1	80
Ladysmith 2	19	—	—	—	—	—	—	3	66	
Lake Cowichan	1	11	—	—	2	17	—	—	3	56
All other areas	13	179	8	68	—	—	1	130	10	527
Total Regional District	22	436	9	102	2	17	1	130	17	729
• Mt. Waddington										
Port Hardy	4	155	2	115	—	—	—	—	5	247
Port McNeill	2	68	1	36	—	—	—	—	1	26
Alert Bay	3	30	1	6	—	—	—	—	1	20
Port Alice 1	20	—	—	—	—	—	—	1	20	
All other areas	2	19	2	32	17	116	1	10	6	266
Total Regional District	12	292	6	189	17	116	1	10	14	579
• Nanaimo										
Nanaimo	15	528	5	460	—	—	1	18	8	452
Parksville	11	223	9	509	—	—	1	74	13	1382
Qualicum Beach	14	178	3	152	—	—	1	91	6	326
All other areas	8	37	2	110	4	78	1	174	12	637
Total Regional District	48	966	19	1231	4	78	4	357	39	2797
• Powell River										
Powell River	6	106	3	164	1	6	1	81	7	147
All other areas	1	7	—	58	—	—	3	93	—	—
Total Regional District	7	113	3	222	1	6	4	174	7	147
• Islands										
Saltspring	15	130	4	41	—	—	2	85	2	78
Galiano/Saturna/ Mayne/Pender	5	118	15	86	—	—	2	65	1	6
Thetis/Gabriola	2	14	2	54	—	—	—	—	1	10
Texada	1	7	1	18	—	—	—	—	1	40
Quadra/Cortes	4	45	1	12	2	42	—	—	2	56
Denman/Hornby	2	8	3	18	—	—	1	10	4	175
Total Islands	29	322	26	229	2	42	5	160	11	365
GRAND TOTAL	254	6551	135	7311	46	566	25	1801	148	8280

2.3.3 FOOD SERVICES/ENTERTAINMENT

This category of services is virtually impossible to inventory as the number and type of both food and entertainment services changes almost daily. Generally, the region has a very strong restaurant sector. Most communities have eating establishments which cater to travellers while many offer an extensive selection of restaurants which caters to all budget and food preferences. This component of the tourism industry is entirely private-sector driven and largely self-regulating. If a demand for additional food services is required, a facility is usually developed.

Although the region is not recognized for its entertainment services, there are numerous theatres and nightclubs clustered in the Victoria area, with other facilities scattered throughout the region.

2.4 STRATEGY IMPLICATIONS OF TOURISM RESOURCES

The above information shows the diversity and quality of the region's tourism resources. These tourism products are diverse geographically because of the size of the region, as well as being diverse in terms of the variety and type of products. Some of the key advantages of the region's tourism resources for development of tourism are as follows:

- **The natural tourism product is spectacular.**

  The region's natural resources range from snow-capped mountains and wild rivers to pastoral valleys and tranquil streams. The region also houses the country's oldest and tallest trees, Canada's highest waterfall (Della Falls) plus world-class scuba diving and fishing.

- **The product offers tremendous variety.**

  Activities to be pursued vary from snow-skiing and urban tours to fine dining or back-country hiking. The area offers very remote wilderness activities to very urban experiences. Depending on the season, a person can golf or sail in the morning and ski in the afternoon.

- **The resources support four-season tourism.**

  A range of typical warm weather activities are available in the region. Winter activities such as downhill and cross-country skiing are popular where facilities exist. Fishing, hiking, golf and urban tourism activities can be pursued 12 months of the year.

- **Several resources are world-class.**

  Some of the world's best salt-water fishing, scuba diving, wildlife viewing and salt-water boating areas are found in the region. The area also has at least one top-quality museum, and a very rich native heritage, and a city which is rated among the world's best vacation destinations.

- **The transportation systems is improving.**

  Work continues on the upgrading of the Island Highway and the construction of the Inland Island Highway. Air access is improving while new ferries are being constructed for the mainland crossing.

- **Proximity of urban amenities to wilderness areas.**

  The region has high-quality urban amenities "within minutes" of rural and wilderness areas. This easy access to wilderness while enjoying urban comforts is unique.

3.0 MARKET ASSESSMENT

Identifying the key tourism development opportunities for the Vancouver Island/Coast Region depends on knowledge of the market profile of visitors to the area. There are several sources which provide market information for the region. These include Visitor '89 (the original survey data plus a special run of visitor data for the Vancouver Island/Coast Region specifically), the Vancouver Island Tourism Monitor, and the Victoria Exit Survey, as well as numerous activity-specific studies. The objective of this section is to outline the general profile of visitors to the region.

3.1 MARKET PROFILE

During 1989, approximately 920,000 non-B.C. resident travel parties visited the Vancouver Island/Coast Region. Of these, approximately two-thirds visited Victoria while one-third visited the rest of the region. This represents just under one-third of all non-resident visitors to B.C. The average party size was 2.6 persons, while the average length of stay was 3.2 nights. Non-resident visitors are believed to account for approximately 50 per cent of total visitors to the region (Vancouver Island Tourism Monitor). Thus, if residents of B.C. are included, the total number of visitor parties to the region in 1989 was approximately two million. It is likely that a higher proportion of B.C residents who visit the region travel outside Victoria, while non-resident visitors more often remain in or near the capital.

Of non-resident visitors to the region, 93 per cent are travelling on their own while seven per cent are on a package tour. Just over half the visitor parties to the region are composed of two adults while only 14 per cent travel with children. According to the Vancouver Island Tourism Monitor, the proportion of British Columbian versus other visitors varies significantly from fall/winter to spring/summer, falling from approximately 46 to 34 per cent respectively. The origin of non-resident visitors includes Alberta (13 per cent), overseas (13 per cent), Ontario (13 per cent), other points within Canada (nine per cent), California (15 per cent), Washington/Oregon (18 per cent) and other points within the U.S. (20 per cent).

- **Sex/Age/Income** (data not available for Powell River and the Central Coast.)

  Of visitors to the Island (excluding the CRD) 59 per cent are female while 41 per cent are male. This compares to 57 per cent and 43 per cent for the province as a whole. Visitors to the Island are only slightly older than visitors to the CRD with 54 per cent being over 45 years of age compared to 53 per cent for the CRD.[1] The household incomes of visitors to the Island are lower than that of visitors to the CRD with 27 per cent earning more than $60,000 compared to 36 per cent for the CRD, and 31 per cent for the province.

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[1] These percentages refer to age of respondent.

- **Accommodation**

Staying with friends and relatives is the preferred form of accommodation for 30 per cent of visitors to the region. This is followed by motel (27 per cent), camping (16 per cent), resort (three per cent) and hotel (3 per cent). For the province as a whole these figures are 37 per cent, 18 per cent, 16 per cent, three per cent and 18 per cent respectively. Thus visitors to the region are far more likely to stay at a motel and far less likely to stay in a hotel than all visitors to B.C.

- **Main Purpose of Trip**

Touring is the main purpose of trip for 46 per cent of visitors to the region. This is followed by visiting friends and relatives (29 per cent), business (11 per cent) and an outdoors trip (5 per cent). For the province, these figures are 26 per cent, 30 per cent, 17 per cent and six per cent. Thus a greater proportion of visitors to the region are touring, while significantly fewer are on business, than is common for the province.

- **Method of Travel**

The method of travel in the region by non-resident visitors varies between regional districts. Approximately one-third of visitors use their own cars. Visitors to the Cowichan Valley and Comox Strathcona are most likely to use their own vehicle (42 per cent) while visitors to Mt. Waddington (16 per cent) and Central Coast (35 per cent) are least likely. The use of rental cars is somewhat more popular in the region than for the province as a whole, with Alberni-Clayoquot recording the greatest number of visitors using rental cars (40 per cent). The use of campers varies significantly, ranging from eight per cent on the south Island, to 24 per cent in Comox-Strathcona and 44 per cent in the Central Coast. The Central Coast further differs from the rest of the region in that more than one-third of visitors arrive by air. This is significantly higher than the five per cent average recorded by the rest of the region and by the province. The 16 per cent figure noted for cruise ship travel to Mt. Waddington is not likely to occur again in the immediate future, as cruise ships will not be stopping at the North Island during 1991.

- **Daily Activities**

The proportion of visitors participating in various activities varies depending on origin. However, comparing the top six activities of visitors to the region with the participation levels of all visitors to B.C. produces the following comparison. (Multiple responses are recorded.)

	Vancouver Island/Coast	B.C.
Sightseeing	58%	42%
Shopping	41%	36%
Beach/lake	32%	21%
VFR	32%	37%
Gardens/parks	30%	20%
Museum/historical	26%	14%

These figures indicate that visitors to the region are more likely to be sightseeing or visiting beaches, parks or heritage sites than visitors to the province generally.

- **Expenditures**

  In 1989, visitors to the Island spent approximately $59 daily per person. This is higher than the provincial average of $54. The top three expenses are accommodation, restaurants and auto transportation.

- **Revenues**

  Tourism is a major economic activity in the region. Based on two million visitor parties, made up of 2.6 persons, staying 3.2 nights, and spending $59 per person results in a total tourist-generated revenue of over 980 million dollars (based on 1989 figures). The estimate for 1990 is in excess of one billion dollars.

The following table provides a summary of the above information for the eight regional districts in the Vancouver Island/Coast Region, for the region as a whole and for the province. Again, this data refers to non-resident visitors only. It should be noted that, because of the survey sample sizes used to calculate the following information for each of the regional districts, this data should be used with caution. (The differences between Exhibits 3.1 and 3.2 are due to differences in geographical boundaries.)

EXHIBIT 3-1

NON-RESIDENT TRAVEL CHARACTERISTICS BY REGIONAL DISTRICT

	C.R.D	COWICHAN VALLEY	NANAIMO	ALBERNI CLAYO-QUOT	POWELL RIVER	COMOX STRATH-CONA	MT. WAD-DINGTON	CENTRAL COAST	VAN. ISL/ COAST	B.C.
Visitor Parties	650,500	49,600	119,500	76,100	13,700	69,400	41,200	4,500	920,000	3,090,000
Party Size	2.7	2.1	2.4	2.6	2.9	2.4	2.6	2.7	2.6	2.47
Average length of Stay	3.02									5.83
Package Tour	7 %	1 %	1 %	4 %	0 %	5 %	19 %	8 %	7 %	6 %
PARTY COMPOSITION										
1 Adult	14 %	21 %	16 %	14 %	2 %	16 %	13 %	6 %	15 %	22 %
2 Adults	52	58	53	51	40	57	60	51	51	47
3 Adults	8	8	6	5	4	3	4	13	7	6
4+ Adults	12	5	10	12	24	11	10	26	12	10
Adult + 1-2 Children	13	8	14	17	19	10	12	0	13	13
Adult + 3+ Children	2	1	1	1	2	2	0	4	1	2
SEASON (Party)										
Winter (Dec. - Mar.)	11 %	10 %	15 %	3 %	2 %	8 %	5 %	0 %	12 %	20 %
Spring (Apr. - Jun.)	27	19	23	25	14	19	30	73	28	25
Summer (Jul. - Aug.)	38	37	41	44	54	44	55	27	38	31
Autumn (Sep. - Nov.)	24	31	21	28	31	29	10	0	23	24
ORIGIN OF PARTY										
Alberta	10 %	24 %	23 %	18 %	15 %	20 %	4 %	0 %	13 %	23 %
Ontario	13	21	18	20	3	11	6	17	13	13
Other Canada	8	12	10	10	12	5	2	0	9	12
Washington	13	9	6	11	9	9	8	8	13	14
Oregon	6	7	5	3	7	4	5	18	5	4
California	16	10	9	7	14	17	26	22	15	9
Other W. USA	11	5	8	6	6	11	9	24	10	7
Other USA	12	2	6	2	2	7	13	11	10	7
International	12	11	16	22	33	16	27	0	13	11
SEX/AGE/INCOME										
Male	43								41	48
Female	57								59	52
15-18	2								1 %	2 %
19-24	7				N/A				7	6
25-34	17								17	21
35-44	22								21	23
45-54	17								20	17
55-64	22								22	18
65+	14								12	12
> $20,000	8 %								13 %	12 %
$20-39,000	30 %				N/A				34	32
$40-59,000	27								26	26
$60,000+	36								27	31
ACCOMMODATION (Party Nights)										
Hotel	4 %	3 %	5 %	5 %	0 %	1 %	4 %	8 %	16 %	17 %
Motel	29	23	20	38	12	21	15	5	27	18
Resort	1	.4	4	12	2	9	0	35	3	3
Bed & Breakfast	4	.3	.2	2	—	2	6	0	3	1
Camp	11	20	17.2	27	23	34	28	36	16	16
VFR	26	53	51	10	43	26	37	0	30	37

	C.R.D	COWICHAN VALLEY	NANAIMO	ALBERNI CLAYO-QUOT	POWELL RIVER	COMOX STRATH-CONA	MT. WAD-DINGTON	CENTRAL COAST	VAN. ISL/ COAST	B.C.
MAIN TRIP PURPOSE (Party)										
Business/Conference	10 %	14 %	12 %	6 %	7 %	14 %	0 %	7 %	11 %	17 %
VFR	27	34	35	20	27	24	24	20	29	30
Touring	50	39	41	48	55	46	68	34	46	26
City Trip	5	2	1	2	0	.3	1	0	5	3
Personal	3	9	4	6	0	4	0	0	3	3
Outdoors Trip	4	3	8	18	10	12	8	39	5	6
METHOD OF TRAVEL IN B.C. (Party)										
Own Auto	36 %	42 %	34 %	30 %	35 %	42 %	16 %	25 %	35 %	32 %
Rental Auto	31	35	32	40	36	25	24	17	31	30
Own Camper	8	8	15	14	18	24	21	44	8	13
Bus	15	7	11	13	6	9	22	5	14	13
Air	4	7	5	5	3	7	6	35	5	5
Train	2	0	4	1	2	1	2	6	3	3
Cruise	2	1	2	2	0	2	16	0	2	3
Ferry	36	47	44	44	36	47	46	0	38	43
Other	14	13	19	18	17	15	14	25	15	19
DAILY ACTIVITIES (Party Nights)										
Business/Conference	10 %	11 %	9 %	16 %	0 %	10 %	2 %	7 %	9 %	14 %
Sports Event	1	3	1	2	9	5	2	0	2	2
Festival	5	1	4	5	0	1	1	0	4	5
Shopping	48	33	38	48	17	28	19	4	41	36
Took a Tour	16	6	7	15	6	5	15	0	12	8
Sightseeing	65	46	49	60	54	44	38	39	58	42
Passing Through	11	13	15	26	26	19	30	36	14	17
Fishing	.4	1	3	3	8	11	0	41	2	2
Other Outdoor	16	15	27	38	27	40	19	11	23	21
Skiing	.3	1	.1	0	0	.3	0	0	.3	4
Golf	1	0	1	1	0	.4	0	0	1	1
Fitness Activity	2	.2	4	3	1	2	0	0	2	3
Other Sporting	4	7.5	3	11	23	9	7	30	6	7
Nightlife	11	5	8	5	3	10	2	7	9	11
Beach/Lake	23	25	41	65	66	48	42	15	32	21
Museum/Historical	35	14	13	14	7	15	14	2	26	14
Fair/Amusement Park	4	1	1	1	0	1	1	0	3	3
Gardens/Parks	38	14	16	22	4	17	9	5	30	20
VFR	30	48	47	13	53	28	5	0	32	37
PER PERSON DAILY EXPENDITURES										
Accommodation	21.08	7.88	7.90	17.55	6.21	13.15	9.92	6.47	17.64	16.04
Auto Transportation	4.29	7.90	5.29	7.97	4.95	6.88	7.73	6.42	5.09	6.06
Other Transportation	6.04	3.59	4.29	1.98	3.89	3.51	22.14	23.82	5.78	2.70
Package/Cruise	3.30	.26	.46	3.28	0	2.48	20.26	102.47	3.63	3.47
Restaurants	13.61	11.40	8.03	10.99	5.75	8.34	9.49	4.45	12.13	12.19
Groceries/Beverages	2.19	3.45	3.30	3.15	6.92	4.48	3.02	1.84	2.66	3.50
Recreation	2.24	.35	1.71	6.82	1.89	6.24	1.54	.71	2.65	2.32
Entertainment	1.29	2.11	1.56	3.09	0	.51	.45	0	1.36	1.69
Shop/Souvenirs	10.20	8.14	5.02	4.30	1.80	5.28	2.85	.05	8.48	8.06
Other	2.02	4.59	.91	1.67	.67	2.12	1.22	.69	1.96	2.08
TOTAL	62.91	47.95	38.73	62.62	33.50	49.30	76.33	95.65	58.82	54.19

3.2 TRAVEL/TOURISM TRENDS AND ISSUES

Tourism is not a static industry and recent trends have been significant. The following trends are being observed throughout the province and are not restricted to the Vancouver Island/ Coast Region. They will, however, have a major impact on the future of tourism in the region.

- **A Move to 'Specialized' or 'Theme' Vacations**

  The typical two-week family camping holiday is increasingly becoming a thing of the past. People's choice of travel options are being influenced by a desire for change and the need to participate in activities/experiences which satisfy their motivations for travelling. As a result, specialized travel options are becoming more and more popular allowing people to participate in cultural, historical, environmental, recreational, entertainment and interpersonal tourism.

- **Decreases in Leisure Time**

  The trend towards shorter work weeks and expanding leisure time appears to have stopped. People generally are working harder and have less flexibility when it comes to leisure time. In addition, an ever-increasing number of women continue to enter the workforce. This makes it more difficult to co-ordinate holiday time. The combined result has been a move to more frequent vacations of shorter duration to areas which are easily accessible.

- **Families Looking for Quality, Educational Holiday Experiences**

  There is a growing trend toward making a vacation a 'meaningful' experience. More people want their vacations to be both an opportunity to spend 'quality' time with their family and to learn or teach their children something new. As a result, many operators' programs include a 'teaching' element.

- **Growing Expectations of Quality**

  Due to increasing competitiveness in the tourism industry, communities are going to extreme efforts to construct facilities or promote elements of their environment which are 'bigger and better.' This has resulted both in an increasingly elaborate tourism infrastructure, and in a much more critical and selective tourist. If a tourism attraction is to succeed, it must be of high quality and should allow for participation as opposed to just observation. The cost of providing such quality opportunities is high and it is becoming more difficult for existing operations to compete and for new operations to enter the market.

- **Seasonality**

Until recently, the bulk of tourist activity took place during the summer months when the weather was warm and children were out of school. Although the major proportion of travel still takes place during the summer, there has been a growing trend towards four-season tourism. Given the numerous opportunities to participate in winter activities, this trend is likely to continue.

- **Increasing Role of Travel Planners**

A recent, successful marketing trend has seen operators, the government and wholesalers working together to develop travel packages designed to keep people in an area longer. Generally, travel influencers such as wholesalers, travel agents, associations, airline companies, inbound operators and travel planners are playing a greater role in setting the direction of the industry.

- **Concern for the Environment and Habitat Degradation**

People are becoming more environmentally conscious. Concern for, and interest in, the environment and habitat degradation will increasingly influence travel decisions and activities.

- **Increasing Popularity of Health-Related Facilities**

A growing awareness of the value of a healthy lifestyle will likely continue to generate increased interest and participation in outdoor-, and fitness- oriented activities by tourists.

- **Trip Purpose**

An increasing number of visitors to the province and to the region are travelling on business (17 per cent in 1989 compared to approximately 12 per cent in 1979). More people are travelling for self-improvement or enrichment, to learn, to acquire interests and friends and to improve their physical well-being.

- **Adventure Markets**

Those interested in the outdoor and adventure market are choosing increasingly exotic destinations for their trips. This trend will continue as people look for unspoiled destinations. Many outdoor and adventure travellers see an exotic trip as a status symbol.

3.3 NON-B.C.-RESIDENT TRAVEL TRENDS

The following tables are summarized from Visitors '79 and Visitors '89 and provide an overview of changes occurring among non-resident visitors to Vancouver Island during the past decade. (This data does not include the Powell River and Central Coast areas.) A summary of the impact of these trends is contained in Section 3.4.

EXHIBIT 3-2

NON-B.C.-RESIDENT TRAVEL TRENDS ON VANCOUVER ISLAND

	Visitors '79	Visitors '89	
	Vancouver Island	**Vancouver Island excluding Victoria**	**Greater Victoria**
Non-Resident Visitor Origin			
Alberta	18 %	21 %	14 %
Other Canada	16 %	27 %	26 %
Washington	18 %	8 %	12 %
California	20 %	11 %	16 %
Other U.S.	21 %	13 %	22 %
International	7 %	19 %	11 %
Parties	403,600	330,000	700,000
Party Size	3.0	2.5	2.3
Party Composition			
Adult(s) + 1 or 2 children	17 %	14 %	13 %
Adult(s) + 3 or more children	4 %	2 %	2 %
One Adult	15 %	19 %	13 %
Two Adults	51 %	51 %	53 %
Three Adults	4 %	5 %	8 %
Four + Adults	8 %	9 %	12 %

	Visitors '79	Visitors '89	
	Vancouver Island	Vancouver Island excluding Victoria	Greater Victoria
Accommodation			
Hotels	19 %	3 %	15 %
Motels	35 %	21 %	21 %
Resorts-Lodges	—	7 %	—
Visiting Friends and Relatives	21 %	38 %	50 %
Campground	21 %	24 %	12 %
Bed and Breakfast	N/A	2 %	4 %
Transportation Within region			
Car	60 %	62 %	67 %
R.V.	10 %	13 %	8 %
Bus	3 %	13 %	16 %
Plane	22 %	5 %	4 %
Length of Stay in region			
1 Night	25 %	27 %	35 %
2 Nights	27 %	21 %	30 %
3 Nights	15 %	15 %	16 %
4 Nights	9 %	9 %	7 %
5-7 Nights	12 %	15 %	8 %
8-10 Nights	5 %	9 %	2 %
11+ Nights	7 %	5 %	2 %
Season			
Winter	N/A	13 %	11 %
Spring	N/A	27 %	27 %
Summer	39 %	38 %	—
Fall	22 %	24 %	—

3.4 TOURISM STRATEGY IMPLICATIONS

The above figures identify the following key trends regarding visitors to the region between 1979 and 1989. These trends will have implications for the proposed regional tourism strategy. The following points summarize regional trends which have been derived from the research reports and from the observations of knowledgable tourism operators within the region.

3.4.1. Research Statistics

- There has been an increase in the number of Canadians and international visitors travelling to the region and a decrease in the number of Americans.

- The number of parties travelling to the region has increased by two-and-a-half times growing from just over 400,000 in 1979 to more than a million in 1989. The actual number of visitors has only doubled, because of the decrease in party size, but still totalled close to two million in 1989.

- There has been a decrease in the number of families travelling with children and an increase in the number of adults.

- The proportion of visitors to the region staying in hotels and motels has declined significantly, while the proportion staying in a resort or lodge, or visiting friends and relatives, has increased noticeably. When averaged, the proportion of visitors who camp has also declined while bed-and-breakfasts, which hardly existed in 1979, now provide accommodation for four per cent of visitors to Victoria and two per cent of visitors to Vancouver Island.

- The automobile continues to be the preferred form of transportation for the majority of visitors to the region, with the overall proportion increasing slightly during the last decade (60 per cent to 63 per cent). The proportion of visitors using RVs has remained stable although the actual number has increased significantly. There has been a significant increase in bus travel and equally significant decrease in plane travel.

- Average length of stay in the region is decreasing. In 1979, 52 per cent of visitors spent one or two nights in the region, while in 1989 this figure was 65 per cent for visitors to Victoria and 58 per cent for visitors to the rest of the Island. Visitors to the Island are two or three times more likely than visitors to Victoria to spend a week or more in the region.

3.4.2. Some Observed Trends

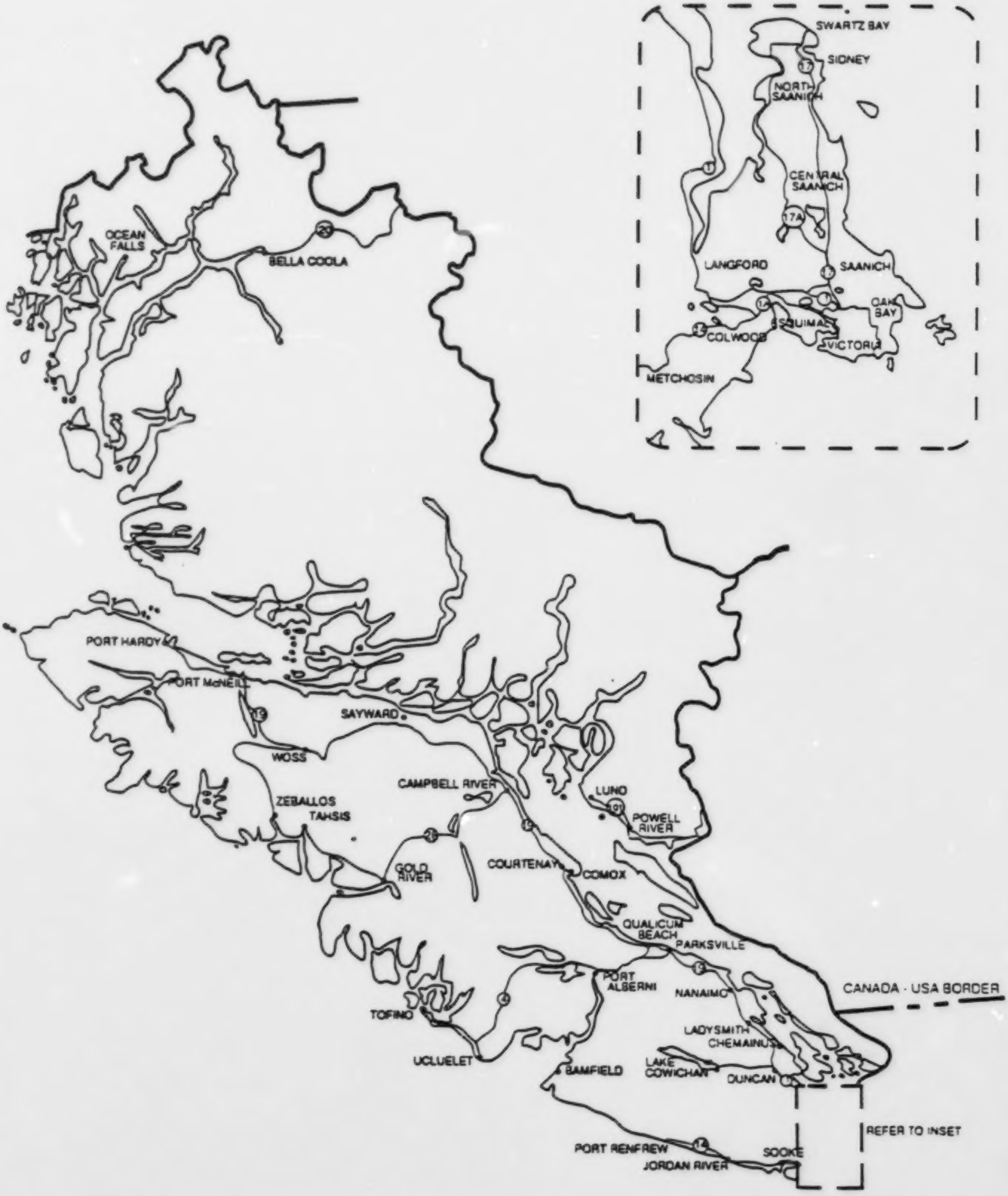
Key trends identified by tourism operators and representatives of the industry in the region include the following:

- The number of visitors from Europe, especially Germany, as well as Japan and other Asian countries, is increasing.
- B.C. residents are making up an increasing share of total travellers to the region.
- There has been noticeable growth in shoulder season travel, especially May and September.
- More people are expressing interest in outdoor adventure or recreation activities, especially those organized in a full-service package.
- There has been an increase in the number of seminars, conferences and conventions held in the region (largely due to the Victoria Conference Centre and the promotion of the region for "retreats").
- Visits to the region are spreading to different communities rather than focusing in prime areas.
- More people are travelling on long weekends.
- More visitors appear to be following a pre-planned itinerary and are increasingly concerned about keeping busy or entertained.
- There appears to be an increasing distinction between visitors who are willing to pay for quality facilities, services and activities and those who are budget-conscious.
- An increasing number of visitors to the region are on organized tours.
- Visitors are expressing increased interest in marine-based activities.
- There has been an increase in the number of seniors and retired people travelling in the region.
- Visitors are more focused regarding the activities in which they wish to participate. The proportion of visitors 'touring' appears to be decreasing in favour of people pursuing a specialized vacation.

PART II

TOURISM DEVELOPMENT STRATEGY

REGION ONE - VANCOUVER ISLAND/COAST


SWARTZ BAY
SIDNEY
17
NORTH SAANICH
CENTRAL SAANICH
17A
LANGFORD
SAANICH
OAK BAY
ESQUIMALT
COLWOOD
VICTORIA
METCHOSIN
OCEAN FALLS
20
BELLA COOLA
PORT HARDY
PORT McNEILL
19
SAYWARD
WOSS
CAMPBELL RIVER
ZEBALLOS
TAHSIS
28
GOLD RIVER
LUND
101
POWELL RIVER
COURTENAY
COMOX
QUALICUM BEACH
PARKSVILLE
PORT ALBERNI
NANAIMO
CANADA - USA BORDER
TOFINO
4
UCLUELET
LADYSMITH
CHEMAINUS
LAKE COWICHAN
DUNCAN
BAMFIELD
REFER TO INSET
PORT RENFREW
14
SOOKE
JORDAN RIVER

PREFACE

VANCOUVER ISLAND/COAST REGION TOURISM DEVELOPMENT STRATEGY

All jurisdictions which make up the Vancouver Island/Coast Region, to varying degrees, recognize tourism as an economic development and diversification opportunity. An increase in the numbers of visitors coming to the region, combined with increased demand for a range of tourism services, has produced major economic, social and infrastructure benefits for the region.

According to Visitor '89, 920,000 non-B.C.-resident travel parties visited the region in 1989. If resident travellers were included in this count, the actual number would probably be closer to two million. An average party size of 2.6 and an average length of stay of 3.2 nights means that in 1989, total visitor nights equalled approximately 17 million. Applying this figure against an average daily per person expenditure of $58.82 indicates that 1989 direct tourist spending on Vancouver Island alone equalled $1 billion. Clearly, the value of tourism as a contributor to the regional economy is significant.

Trying to predict the future impact of tourism on the region is difficult, as many factors must be considered. However, there is strong indication that the industry holds excellent growth potential. As Section 2 indicates, the region provides a range of attractions and services. In addition, many of the region's most valuable tourism resources have yet to be fully developed.

The trend information discussed in Section 3 also reflects positively on the potential of the region's tourism industry. The tourism resources of the Vancouver Island/Coast Region complement many of the major trends and travel preferences which will be affecting travel decisions in the near future – clean air, pristine environment, wilderness and adventure opportunities, commitment to healthier lifestyles, and increasing participation in outdoor activities, plus a range of urban activities.

At the international level, tourism activity has been increasing at a steady pace during the past decade. The easing of travel restrictions in the Eastern Bloc, the improving economies of some developing nations, and ongoing expansion of global transportation and communications networks will all contribute to increased travel and tourism activity at the international level. These developments hold potential for tourism in the Vancouver Island/Coast Region as long as local, national and world economies remain healthy.

Based on consideration of these general factors, it appears development potential for tourism in the Vancouver Island/Coast Region is positive. However, it is apparent that despite the general overall quality of the tourism product, the many committed individuals working in the industry, and ongoing increases in the number of visitors, there are a number of important issues and problems which need to be addressed if the potential of the development opportunities outlined in this strategy are to be achieved.

Section 4 provides an overview of the issues and problems facing the expansion of the tourism industry in the region. This includes several general observations about various aspects of the industry which affect all or most areas within the region. Suggestions for addressing these issues are also provided.

Section 5 begins by identifying development themes. Each theme includes a market profile overview and summary of key strengths and weakness. Based on an assessment of economic impact, community and market need, economic and market feasibility and regional impact, the opportunities in each of these theme areas with the greatest development potential have been highlighted. These priority opportunities are defined and include a list of the steps which need to be taken to ensure their implementation. Each section concludes with a list of other opportunities which also have development potential.

4.0 REGIONAL TOURISM INITIATIVES

Despite the many factors working in favour of the region's tourism sector, there are a broad range of constraints and problems facing the industry. Because these issues affect the industry generally, they are addressed separately from the specific opportunities or priorities (See Section 5). These issues have been grouped into the following categories:

- *administration issues;*
- *cost issues;*
- *development issues;*
- *infrastructure/industry limitations; and*
- *perception problems.*

Although the development opportunities identified in Section 5 will contribute significantly to the region's tourism industry, the degree to which their potential can be achieved is largely dependent on resolution of the following issues. Recommendations for dealing with these issues have been provided for each topic.

4.1 TRANSPORTATION ISSUES

4.1.1 Inadequate Transportation Links

Issues:

Inadequate transportation links have been identified as a key constraint to the development of tourism in the region. Transportation problems range from poor or inadequate ferry scheduling on the Sunshine Coast, Queen of the North, and the Mainland to Vancouver Island runs, to poorly maintained roads, the lack of a circle route on the Island, and inadequate transportation alternatives.

Recommendations:

The region's tourism industry should endorse the findings of the Vancouver Island/Coast Transportation Task Force. Those which are of most relevance to the tourism industry include:

- the ongoing upgrading of the Island Highway, which is of critical importance;

- the development of another north-south highway — ie., from the Comox Valley through Port Alberni to Lake Cowichan;

- assessing the potential of expanding rail service as an alternative transportation option;
- reviewing the opportunity to improve water transportation links to smaller coastal communities — ie., those in the Central Coast; and
- encouraging the development of improved regional air service.

In addition to endorsing the above transportation task force recommendations, additional suggestions include the following:

- increase the number of summer sailing on the Mainland-Vancouver Island, Sunshine Coast and Northern Island-Prince Rupert runs; and
- consider the development of regionally unique integrated directional and points-of-interest signage for tourist facilities and services.

4.2 ADMINISTRATION ISSUES

4.2.1 Government Involvement and Red Tape

Issues:

There is a general feeling of skepticism regarding the viability of any government initiated "strategy". Tourism representatives throughout the region referred to the range of different studies which have been conducted over the past several years. There is frustration that the potential benefits of these studies have been lost because no agency has been assigned responsibility for implementing the recommendations.

Many individuals are concerned about the time and effort spent on government-sponsored community-based tourism strategies two years ago. Despite high expectations, very little resulted from their work. At present, there is some confusion regarding this study and the Tourism British Columbia's Community Action Program. Furthermore, there is a perception that, despite the studies and research undertaken by the government, private operators or associations for which they were written have little awareness of their existence.

From a practical perspective, there is concern that while tourism development is being viewed in the context of the **economic development regions**, marketing activities occur within the context of the **tourism regions**. Since development and marketing activity complement one another, it is difficult to rationalize the different boundaries.

In a number of communities, the attitudes and actions of regional districts and/or municipal governments regarding the tourism industry are also a serious constraint. Although most local governments are interested in fostering tourism, it is apparent that there is a general lack of recognition regarding the viability of tourism. This is especially true in communities which are heavily reliant on primary resource or extractive industries, but is also true in communities which do not want change. Furthermore, although almost every community's economic development strategy recognizes tourism as an economic development opportunity, few provide any funding assistance for the tourism resources in their community.

In addition to these concerns, tourism operators and developers are clearly frustrated by the delays and uncertainties associated with zoning applications, development approvals and, the need to deal with several levels and/or departments of government. The government is frequently viewed as the major obstacle operators and developers must overcome in order to pursue their projects.

Recommendations:

- Ensure copies of this strategy are widely distributed throughout the region. It may be presented in a series of government- or agency-sponsored workshops in each regional district or community where requested or required. These workshops should be open to all those involved in the industry. As part of these workshops, it is critical that the importance and value of working together at every level be emphasized. Explaining the reason for the strategy, how people can be involved, and how they will benefit, should greatly enhance its ultimate success. Agencies and individuals which should receive a copy of the strategy include, but are not limited to:

    - potential investors;
    - regional and local tourism associations;
    - tourism operators associations;
    - local governments;
    - regional districts;
    - economic development associations;
    - financial institutions;
    - native bands;
    - chambers of commerce;
    - government agents;
    - the Association of Vancouver Island Municipalities; and
    - the Union of B.C. Municipalities.

- The contents of this strategy should be communicated to Tourism British Columbia to ensure that actions resulting from the Community Tourism Action Program complement those of this strategy. It is also suggested that the strategy be given to other government ministries who may be directly or indirectly affected by the recommendations (including ministries of Forests, Lands, Environment, and Transportation and Highways).

- Because tourism development and marketing are closely linked, development should be viewed in the context of the traditional tourism regions rather than the economic development regions. It is confusing and inefficient to continue to address these two issues using different geographic boundaries.

- Every effort should be made to streamline bureaucracy and to facilitate the administrative requirements associated with tourism development. It is worth considering the establishment of staff and/or an office which can function as a 'one-stop' centre for assisting the private sector in dealing with the bureaucratic and regulatory requirements of the tourism industry.

- In order to address the lack of interest in, or commitment to, tourism by some local governments, consideration should be given to initiating a study designed to quantify the benefits to communities of tourism.

- Local and/or regional district governments should be encouraged to adopt or incorporate relevant components of this strategy as part of local economic development strategies.

- If the Vancouver Island/Coast area remains the focus for tourism development, then representatives from the Powell River and Central Coast regional districts need to be involved in all relevant 'regional' associations. It should be noted, however, that these two regional districts have traditionally been associated with the Tourism Association of Southwest B.C. and the Cariboo-Chilcotin Tourism Association respectively and benefit from and prefer this arrangement.

4.2.2 Tourism Agencies

Issues:

The following describe concerns as they relate to organized tourism associations in the region.

- Local Area Tourism Associations

  Many communities have a local tourism association. There are also numerous associations which represent specific components of the tourism industry. The number and scope of these associations is not a problem. These groups have been responsible for many of the positive things which have been happening in the industry. What is apparent, however, is that a number of the local tourism associations are addressing the goal of promoting tourism in a parochial manner. Generally, it is very difficult to get people to view tourism from the regional perspective. Because communities have traditionally been responsible for promoting tourism development and marketing at the local level, it will be difficult to get them to take a regional focus.

- Regional Tourism Associations

There are two key associations which address tourism marketing and development issues on Vancouver Island. These are TAVI (Tourism Association of Vancouver Island) and VIDEA (Vancouver Island Developer's Economic Association). (The Powell River and Central Coast regional Districts are not represented on TAVI. The Powell River area works with Travel Sunshine Coast and the Tourism Association of Southwest B.C., while the Central Coast is connected with the Cariboo-Chilcotin Tourism Association.) The key mandate of these associations is to market the region. Although these groups have done some excellent work in this area, two concerns have been identified regarding the effectiveness of their efforts to date and their future ability to adequately promote those tourism opportunities identified as part of this strategy:

- If the geographic focus of tourism development regions remains different from tourism marketing regions, it will be awkward to create a market focus for the region as a whole.

- Many people involved in tourism are satisfied with the effectiveness of the approach of these associations to marketing the region. However, concern was expressed that the associations are not marketing the areas they represent in an equitable manner. In addition, there is a perceived lack of consultation at the local level.

- Chambers of Commerce and Tourist Information Centres

In a number of communities the functions of the chamber of commerce are combined with those of Tourist Information Centres. This set-up generally works effectively. Overall, the individuals who staff the region's Tourist Information Centres do a good job of providing visitors with the information they request. However, there is a correlation between the amount of effort and budget that chambers allocate to tourism and the overall role tourism plays in a particular community. Thus tourism operators in a community with a tourism-oriented chamber feel well-served, while those in areas where it is not given a priority feel their membership is less useful. Furthermore, funding cutbacks have lead to a reduction in the number of information staff. For some smaller communities, the inability to generate enough memberships to qualify for non-profit status means they do not meet the requirements to establish a B.C. Travel Information Centre, and thus cannot access government-produced brochures.

In addition to this concern, it is apparent that tourists are being negatively affected by the actions of several of the region's Information Centres. A number of these centres do not encourage, and in some cases discourage, tourists from visiting the other com-munities. Although the Tourist Information Centres provide travellers with a great deal of information and assistance, a general lack of knowledge about the area beyond their community is negatively affecting the sharing of tourism benefits throughout the region.

Because chambers play a key role in encouraging business development in the community, and because Tourist Information Centres will be a major source of information for visitors regarding 'regional' opportunities, they need to be made aware of the impact their actions have on the industry.

Recommendations:

The three key issues which need to be addressed by the region's tourism associations and agencies are education, marketing and funding status. Suggestions for addressing these issues are as follows.

- Education
  - Much of the region needs to improve the quality of instruction and training given to travel counsellors staffing Tourist Information Centres in order to achieve a regional standard. These counsellors need to be familiar with the region to effectively promote it. In addition to Super Host and/or hospitality training regarding local attractions, travel counsellors should be given a familiarization tour of the region.
  - The provincial government should increase the role it plays in both educating local governments and other industries regarding the value of tourism, and in providing relevant training programs.
- Marketing
  - A regional marketing strategy should emphasize the quality, uniqueness, accessibility, and variety of the tourism opportunities available in the region. Where relevant, marketing efforts could also capitalize on the "island" orientation of these opportunities. Promoting opportunities such as the Sunshine Circle Route would help link the Mainland with Vancouver Island.
  - Regional marketing activity should be designed to develop a focus for, and raise the overall profile of, the region. It should be consistent, reflect quality and give equal coverage to the different areas in the region. It is important that the tourism opportunities in Victoria be differentiated from those in the rest of the region.
  - Marketing of specific communities or services should remain the responsibility of individual communities or operators, although operators should be encouraged to combine marketing efforts in order to increase market profile while cutting costs.
  - The creation and promotion of package tours which incorporate regional tourism opportunities (heritage, native culture, specific activities) would be an effective approach to promoting the region.

- A constraint to development is the lack of a central number that potential visitors could phone to request information or make reservations. Although regional reservations systems are not feasible, accommodation operators in the Vancouver Island/Coast Region should be encouraged to participate in the recently established B.C. Reservations System and to promote the ongoing improvement of information services provided through Tourism British Columbia's 1-800 number.

- The region's current information system is unable to provide visitors with resource specific data — i.e., a list of all heritage industrial sites. To better meet visitor needs in this regard, consideration should be given to incorporating this kind of data into the existing information system and offering access on a user-fee basis. This fee could also entitle the user to a hard copy of the information they are seeking.

- Greater priority should be placed on enhancing existing markets rather than developing 'new' markets. Every effort should be made to inform visitors already coming to key destinations (i.e., Victoria, Strathcona Provincial Park, Pacific Rim National Park), or participating in specific activities, of other opportunities in the Vancouver Island/Coast Region. However, it is also critical that the industry remain aware of trends, such as those identified in Section 3, in order that opportunities provided by new markets and activities can be tapped.

- regional and local tourism associations should review the approach they currently take to marketing in the context of how effectively it promotes the region. Increasing the level of consultation occurring among communities should improve community awareness and support of regional marketing activities.

- Funding Status

- The province should review the criteria chambers of commerce need to meet in order to qualify for the right to establish a B.C. Travel Information Centre and access government produced tourism brochures. Consideration could be given to allowing chambers in rural areas to function as satellite information centres with access to brochures if they can demonstrate a certain level of demand or visitor traffic. The government could also consider giving these more rural Information Centres (and tourist operations generally) priority when determining eligibility for cost-shared job programs.

4.3 COST ISSUES

4.3.1 Financing

Issues:

Securing financing for tourism development or facility expansion can be very difficult. Commercial lenders are reluctant to provide funding for facilities which have traditionally served a seasonal clientele and which have a relatively high failure rate. Getting private individuals to invest in the industry can also be difficult because of the many variables that can adversely affect business performance. However, tourism facilities generally need to be in place to create demand and may take several years to become profitable.

Marketing costs are also a critical issue for many operators and communities. Industry representatives voice a wide range of concerns regarding the high costs of marketing effectively and the difficulty of accessing quality marketing opportunities – i.e., trade shows. Smaller communities and operators, in particular, comment on the lack of marketing support available, the lack of partnering opportunities and activity between regions, and the difficulty of encouraging businesses to contribute tourism marketing dollars.

Recommendations:

- Tourism operators wishing to secure financing should be prepared to provide lending institutions with a well-thought-out business plan. Assistance in preparing business plans should be provided through government sponsored publications, workshops and college programs.

- Lending institutions need to be educated regarding the potential of the tourism industry and the need for flexibility in providing financing for operators who generate revenue on a seasonal basis.

- A low-interest loan program should be re-established by the provincial government to provide funding for operators who cannot obtain financing through commercial institutions or other government programs such as Community Futures. Project eligibility should be based on acceptable proof of concept feasibility, equity participation and willingness to adhere to a process of accountability. The projects should relate to those opportunities identified as part of this study.

- Loan guarantee services available through the Ministry of Development, Trade and Tourism for expansion and upgrading should be formalized as a tourism support program.

- Non-resident and overseas investment potential in the tourism industry should be more effectively tapped. This potential can be encouraged in two ways. On the one hand, regional districts should compile a list of the property available in their area which is zoned appropriately for tourism development. Another list, compiled in consultation with local governments, chambers, tourism associations, etc., should identify tourism development opportunities. These lists should be submitted to the Trade Development Corporation's *Overseas Investment Branch and to any other government departments* which play a role in matching investors with investment opportunities.

  On the other hand, the provincial government could take the initiative in dealing with the issue of investment by developing a directory of agencies who traditionally invest in tourism development (similar to the manufacturers and apparel directories). This directory could be made available to the industry or to regional districts who could approach these agencies directly.

- Cost-shared marketing funding and marketing advice should be made available to individual operators who have a product and can demonstrate viability, but who lack the means or know how to undertake an effective marketing strategy.

4.3.2 Travel Costs

Issues:

The costs of gas, food, accommodation, rental cars and ferries are deterring some visitors. Now that the Canadian dollar is closer to the U.S. dollar, it is not as attractive for Americans to visit British Columbia.

Recommendations:

- Although high travel costs in the region will continue to be a concern to visitors, this can be countered by promoting the quality and uniqueness of the region's tourism resources and by encouraging operators to provide quality facilities and first-class service. For an accommodation facility this could simply imply spotless facilities, ongoing maintenance and friendly, informative hosts.

- Consideration should be given to reducing the disparity between Canadian and American gas prices.

4.3.3 Taxes

Issues:

Taxes pose a major concern for the region's tourism industry. The two key tax issues are property taxes and service taxes. Recent and ongoing increases in property assessments and taxes are are of concern to many tourism operators. In addition, a range of "service" taxes add to the already high costs of travelling in the region. These include the eight per cent room tax, the two per cent hotel tax (levied in Victoria) and, as of January 1991, the seven per cent Goods and Services Tax.

Although it is unknown how the GST will affect travel decisions, there is little doubt that, as a service industry, the costs of operating and purchasing tourism services will be higher. Pre-dictions that more U.S. tourists will stay home and more Canadian tourists will go to the U.S. need to be taken seriously.

Recommendations:

- The government should reduce the eight per cent room tax to six per cent (the same as the retail sales tax).
- It is important that accommodation operators remain aware of community trends in property assessments. Since the replacement of the 'seasonal resort' classification with the provisions of the Tourist Accommodation Assessment Relief Act, many operators have found themselves paying higher property taxes. By remaining aware of changes in property valuation processes and assessments, operators can ensure the system is working equitably and that they are not paying more than required.

4.3.4 Agency Responsibility

Issues:

Due to the diversity and ill-defined nature of tourism, it is difficult to get those involved to agree "who should pay". At present, there is a lack of consistency among local governments with regard to the funding of tourism. In some areas of the region, for example, a substantial portion of tourism funding comes from the municipalities. One regional district has the letter patent to permit tourism funding. Based on these inconsistencies, it will likely be difficult to secure additional funding support for the implementation of a regional development or marketing strategy.

Recommendations:

- This is a real concern and not one that is easily resolved. Because local governments will be more likely to support an industry or specific opportunities if they can see the potential benefits to the community, the availability of data quantifying the economic impact of tourism would also be useful in addressing this issue.

- Local tourism associations and chambers of commerce, etc., should be encouraged to keep local governments apprised of tourism activities and benefits. Developing a close working relationship with local government, and highlighting the impact of government-provided tourism support dollars should help enhance the degree of local government commitment to the industry.

4.3.5 Support Programs

Issues:

There is a lack of support programs available to the tourism industry. Although most people realize that tourism is largely a private-sector responsibility and should not be in the position of receiving handouts from government, tourism operators and organizations throughout the region acknowledge the need for some form of support.

Nothing has replaced the gap left by the conclusion of the TIDSA and ERDA programs, while the Partners in Tourism Program is viewed with mixed success, having limited application to smaller communities and smaller properties or operators.

Furthermore, the stipulations of some available grant programs are designed in a manner which can discourage potential tourism development. In the case of GO B.C. funds, for example, the final one-third of allotted monies are not released until the project in question is completed. This arrangement presents potential cash flow problems which may discourage development.

Recommendations:

- The province should establish a low interest loan program geared to the tourism industry. Like TIDSA, such a program should require equity and commercial lender participation. Priority funding should go to projects identified in this strategy but be subject to proof of market potential and adequate return on investment.

- The Partners in Tourism funding formula should be continued and enhanced.

- Government should provide updated support program information to local chambers and/ or tourism associations to ensure operators (the industry) are made aware of them. Encourage chambers and associations to make this information readily available to their members.

- The Ministry of Development, Trade and Tourism should enhance the marketing, technical and feasibility assessment services available to the industry.

4.4 LAND-USE ISSUES

4.4.1 Resource-Use Conflicts

Issues:

Conflicts between the tourism and forestry industries and, to a lesser extent, the fishing and mining industries, are issues in a number of areas. The degree of conflict varies, but the basic issue revolves around the argument that the activities of one industry negatively affect the economic viability of the other. Local, national and international exposure of these conflicts is damaging the tourism industry. Although many people recognize the need for a balance between the two sides, ongoing conflict between tourism and the resource industries forms the basis for the lack of co-operation between some communities and animosity between the industries.

Although forestry companies have made a significant commitment to addressing public concerns and are reviewing some of their logging practises, there is still a lack of willingness to recognize the need to protect the tourism values of certain forestry areas. It needs to be understood that tourism is just as much a natural-resource-based industry as forestry, mining and fishing.

It is critical that both sides recognize that tourism and forestry can co-exist, that both industries need to be protected and that ongoing polarization is aggravating rather than addressing land-use conflicts. Resolving this problem requires commitment and compromise by all involved.

Recommendations:

- While some forestry practises detract from the region's appeal in specific areas, logging companies have started to respond to public criticism by providing free information tours of forestry and mill operations throughout the region. Public response to these tours has been positive and it is recommended that they be continued and expanded.

- To deal with this important issue, it is recommended that a committee comprised of representatives of the forestry, tourism, and other resource industries, as well as relevant government ministries, be struck. This committee should oversee the development of Geographic Information System (GIS) maps which highlight those areas sensitive to each of the industries. Use of GIS will provide an effective data management system as well as a practical, balanced assessment of land use issues/priorities and a basis for making land-use decisions. The GIS maps being produced as part of the marine tourism study could be used or built on for this purpose.

- While the above is a practical way of dealing with resource conflicts, it is also recommended that the tourism industry use forestry and other resource based activities to their advantage rather than their disadvantage. The Cowichan Valley is successfully doing this with the ecomuseum concept. Also, visitors who have participated in industrial tours throughout the region express high levels of satisfaction with their experience.

4.4.2 Land/Site Availability

Issues:

In some areas, much of the land suitable for tourism development is owned by forest companies, held in the Agricultural Land Reserve, or zoned for non-commercial uses. Some land, previously zoned as tourist commercial, is being rezoned for other uses while land being released by industry (forest companies) is not being considered for tourism uses.

Another major land concern affecting tourism development potential centres around the issue of native land claims. It is apparent that the blockades and protests taking place are negatively affecting traditional components of the industry, as well as those involving specific native communities, in different areas throughout Canada.

Recommendations:

- It is difficult to recommend suggestions regarding land and site availability because of the sensitivity and range of vested interests involved in this issue. Because the provincial govern-ment is responsible for the ALR, it is critically important that the Ministry of Development, Trade and Tourism and/or organized tourism spokespersons remain aware of resource and land-use issues. This will allow the Ministry to represent tourism interests of selected sites and areas when questions such as rezoning or restrictive covenants arise.

4.4.3 Looting

Issue:

Looting or vandalism of native/archaeological resources is a problem and a concern throughout the region. Once the public is made aware of the location of a site, there is very little that can be done to prevent damage or theft. Several archaeological sites in Alberni-Clayoquot, for example, have been damaged. Overall, there is a general lack of sensitivity displayed by some visitors to archaeological sites. The extent and location of these sites makes it difficult to control access or monitor behaviour at more than a few locations. This issue will have to be addressed if native communities are going to be interested in participating more fully in this area of tourism.

Recommendations:

- The development of any archaeological site, should involve the co-operation of the relevant community and the Archaeology Branch of the Ministry of Municipal Affairs. The guidelines of the Archaeology Branch should be strictly adhered to.
- The decision to publicize the location of an archaeology site, or make it accessible to the public, should be based on a review of the degree to which such access can be monitored. More sensitive sites should be accessible to individuals on a selective basis.
- If very sensitive sites have the potential to be of significant interest to visitors, consideration should be given to providing a replica of, or interpretive information about, the resource away from the actual site.
- Greater effort should be made to inform the public, either by guides or signage, of the need to be sensitive to the resources.
- Consider developing a "Watchman Program" similar to that used by the Haida in the Queen Charlotte Islands.
- Enhance the level of infrastructure available to protect archaeological resources. Review site specific issues to determine what infrastructure is required.

4.5 INFRASTRUCTURE AND SERVICES

4.5.1 Tourism Facilities and Operators

Issues:

Although governments and associations make a significant contribution to the region's tourism industry, the industry is primarily private-sector-driven. It is the private sector which builds and operates the majority of the tourism services and most of the attractions. It is also the operators which provide the human element which is so critical to the "hospitality" aspect of the tourism industry. As a result, facility quality and service contribute significantly to the ultimate success of the industry at the site, community, regional district and regional levels.

There are many dedicated, enthusiastic operators running a range of businesses who are committed to meeting the needs of visitors. There are also operators who do not recognize the value of providing good service, are unaware of what constitutes a quality product or good service, and/or have resorted to a variety of unprofessional efforts to discredit or weaken their competition. Some operators are also limited by a lack of access to, or awareness of, relevant training programs for themselves or their staff. There appears to be a particular need for entry-level type programs.

Recommendations:

- Although a number of issues are identified in relation to the region's tourist facilities, they can be largely addressed through education. Even though a range of various tourism-related courses and training programs are available through the community college system or sponsored by government, numerous industry spokespersons identify lack of available training as a problem. To address this situation, the following two steps are recommended:
    - Ensure that existing courses offered by the government and colleges are well advertised (i.e., newspaper, direct mail, association newsletters). Many individual operators do not seem aware of the training opportunities currently available to them and their staff. These courses should provide students with the opportunity to give feedback regarding course content relevancy and other training needs.
    - Effort should be made to make courses relating to tourism business management and developing a business plan, available in some of the communities which currently do not provide business training options.
- Operators also need to be educated regarding the value of providing quality services and being hospitable. Although funding to upgrade will likely continue to be a problem, there is no excuse for tourism facilities not to be clean and well maintained. Where available, operators should be encouraged to take advantage of programs such as Super Host. One of the most effective means of enhancing the tourism appeal of the region is to succeed in providing a quality travel experience for visitors.

4.5.2 Accommodation Grading

Issue:

There is currently no uniform system in British Columbia for grading accommodation facilities nor any one source of grading information. This makes it difficult for travellers unfamiliar with an area to select a facility based on quality, and inhibits facilities committed to providing a quality experience from making travellers aware of the difference between theirs and other facilities.

Recommendations:

- Tourism British Columbia should establish a uniform grading system for accommodation facilities in the province. Facilities should be graded on a regular basis with the resulting ranking information recorded in an internationally recognized format (i.e., one to five stars) in the B.C. Accommodation Directory.

4.5.3 Lack of Accommodation

Issues:

'Accommodation' refers to any facility geared to providing short-term accommodation for visitors. It includes hotels, motels, resorts, fishing camps and lodges, bed-and-breakfasts, and campgrounds. A number of communities in the region lack the accommodation capacity and/or quality needed to serve any increase in the number of tourists to their area. Additional or improved facilities are required in order to provide the accommodations services necessary to successfully implement the other development opportunities described in the section, or to more effectively service existing markets.

However, as earlier noted, the entire accommodation industry, especially in more rural areas, has a problem securing financing. Lending institutions want proof of an immediate and reasonable return on investment, while it generally takes three or more years for an accommodation facility to generate returns on investment.

Thus, although adequate accommodation space is required to draw more visitors, operators must satisfy investors who want proof of adequate demand before they will consider financing accommodation facilities.

Recommendations:

The following recommendations address accommodation capacity and quality issues:

- Develop a full-service, four-season, destination resort in the Vancouver Island/Coast Region.
- Develop small specialty facilities geared to outdoor adventure travellers in the Bella Coola area and in northern Vancouver Island.
- Promote general upgrading of private campgrounds and motels.
- Develop up to two additional quality hotel/motel accommodation facilities in the Powell River regional District. One could be built in conjunction with the new golf course while the second could be combined with the Sliammon or downtown marina/waterfront expansion discussed as part of marine facility development.

- Expand and focus on the bed-and-breakfast component of the region's accommodation sector. Use bed-and-breakfast facilities to deal with immediate accommodation problems in the Mt. Waddington, Long Beach and the Gulf Island areas.

- Development of hotel accommodation in conjunction with Port of Sidney.

- Expand public campsite facilities in Pacific Rim National Park, Port Alberni and Parksville.

- Construct a RV campground in Bamfield, the Comox Valley and the Bella Coola Valley.

- Develop a hotel in Ladysmith once waterfront development is under construction.

The following recommendations address the operations issue:

- Encourage operators to complete a professional feasibility study prior to requesting financing.

- The government should educate the finance industry regarding the special needs of the accommodation sector.

- The government (all levels) should be encouraged to facilitate zoning requirements and building applications where appropriate, to prevent costly construction delays.

- Ensure relevant market and demand information and related research data is made available to developers and or financiers.

4.6 PERCEPTION PROBLEMS

4.6.1 Anti-Tourism Attitudes

Issues:

Too many tourists can be a drain on an area's natural and man-made resources. There is already conflict regarding overfishing by sports fishermen. In addition, there is a perception by some residents that tourism contributes to congestion, pollution, environmental damage, higher prices and crime. Many residents view tourists as a nuisance, and it will be difficult to convince them of the need to make tourism development a priority.

Recommendations:

- The solution to this issue rests largely in education. Communities need to be made aware of the value of tourism and the fact that, as a largely sustainable industry, the negative impact of tourism on the environment is comparatively minimal. This could be a public relations exercise of local tourism associations or chambers.
- The concerns of residents regarding resource exploitation and maintenance of quality of life should be taken seriously. Relevant government agencies need to be encouraged to promote policies, regulations and zoning activities which ensure the ongoing protection of the region's resources and character.
- Communities should be involved to a greater degree in the development of tourism.

4.6.2 Industry Profile

Issues:

The tourism industry suffers from a widely held perception that it offers only seasonal, non-skilled, low-paying employment opportunities. As a result, it is frequently not taken seriously by individuals, investors and local governments.

Recommendations:

- Addressing this issue is also largely a question of education. The government should collect and publish information which quantifies the benefits of tourism in terms of job creation, GNP contribution, visitor spending, etc. Securing policy decisions, community development activities and financing support for tourism will be easier with such information in place.
- Outlining the impacts and benefits of tourism as an optional curriculum topic in the school system is a recommended method of informing students about employment opportunities in the tourism industry. Packages developed by the Pacific Rim Institute of Tourism should be supported.

4.6.3 Staffing

Issues:

The ongoing successful development of the tourism industry depends on the availability of qualified staff. Unfortunately, securing qualified staff is a problem for many operators, especially those in more rural areas. In addition, accommodation for staff can be in short supply in these areas.

Recommendations:

- Give more rural communities and operators priority when it comes to determining eligibility for cost-shared job-creation programs such as Challenge and Job Trac. Encourage communities to compile a list of tourist-oriented positions for submission to these programs.

- Where seasonal accommodation for staff is a problem, consider encouraging more area residents to offer room and board.

4.6.4 Seasonality

Issues:

It continues to be difficult to improve winter and off-season tourism. Long periods of inclement weather in some areas of the region are a deterrent to outdoor activities.

Recommendations:

- The industry needs to be creative in devising ways of increasing utilization of existing facilities in the shoulder and low seasons. There are increasing numbers of people opting to travel during these seasons. More of this market can be captured if the region can become more innovative. For example, the promotion of storm watching on the West Coast as a visitor activity effectively illustrates how a previously negative tourism factor has been turned into a positive tourism resource. Other opportunities could include preparing off-season discounted package tours, and holding off-season events. Operators and communities need to assess the off-season potential and marketability of their area and ensure that it is actively developed and promoted. A regional marketing theme could be used to highlight the overall off-season potential of the Vancouver Island/Coast Region.

5.0 DEVELOPMENT THEMES/OPPORTUNITIES

The resource assessment, market analysis and public input process resulted in a large and diverse range of opportunities being identified. To aid the analysis process, these opportunities have been grouped into a number of categories or themes. These include (in alphabetical order):

- *Arts, Crafts and Music;*
- *Ecotourism and Environmental Tourism;*
- *Education Tourism;*
- *Fishing;*
- *Golf;*
- *Heritage Tourism;*
- *Industrial Tourism;*
- *Marine/Waterfront Development;*
- *Native Culture;*
- *Outdoor Adventure;*
- *Skiing;*
- *Sports Tourism;*
- *Tour Packaging; and*
- *Urban Tourism.*

For each theme the following information is provided:

- *general overview/introduction;*
- *market profile;*
- *strengths/benefits;*
- *weaknesses/constraints.*

The above information prefaces the identification of those opportunities within each theme which have the most significant development potential. To provide more specific direction to the industry and to potential investors, the opportunities in each theme area which have the most significant development potential have been reviewed for **scope, market focus** and **action requirements**. Other opportunities, while also important, have been listed at the conclusion of each section.

The identification of opportunities with the most significant development potential has been based on the assessment of:

- Resource quality:
  - the quality of the physical resource as it relates to the tourism opportunity.

- Economic benefit:
  - the financial benefits likely to be generated to the region by the development of the opportunity such as jobs, tax revenue, or spin-off benefits.
- Development feasibility:
  - the degree of feasibility associated with a specific opportunity such as availability of financing, community support or site access.
- Market need and potential:
  - the degree to which tourists want or need the particular opportunity and the level of demand likely to result from its development.
- Regional impact:
  - how significant the economic impact of a particular opportunity is likely to be on the Vancouver Island/Coast Region as a whole.

Other objectives in identifying these opportunities include:

- encouraging balanced and integrated tourism development throughout the region;
- recognizing the uniqueness of the various areas which comprise the region;
- promoting co-operation and a sharing of responsibilities among various components of the public and private sectors;
- promoting establishment of quality tourism developments where warranted by the resource and market potential; and
- ensuring that development builds on, rather than detracts from, the natural strengths and character of the region.

Within this analysis framework the key development opportunities in each theme have been described. The format is as follows:

- key opportunity;
- opportunity definition;
- market focus;
- public-sector roles; and
- private-sector roles.

It should be noted that the scope of those opportunities identified as having the most-significant development potential varies substantially from theme to theme. Several opportunities (wildlife viewing) apply to the area as a whole, or numerous areas within the region, while others (development of Mt. Washington), are more site-specific. This difference in scope is reflected in the level of detail provided in the public- and private-sectors roles section.

While the objective of these opportunities, and the strategy as a whole, is to promote the overall tourism reputation and profile of the region, it is recognized that the successful implementation of these opportunities rests largely with the initiative taken by individual operators and communities. The themes which follow are described in alphabetical order.

5.1 ARTS, CRAFTS AND MUSIC

Arts, crafts and music has two main tourism components. One involves the use of special art or music events to draw visiting participants and/or spectators. The other component involves the creation and sale of locally produced arts-and-crafts to visitors. The first component is usually a one-time or annual short-term event while the latter occurs throughout the year.

The Vancouver Island/Coast Region has a very active and talented artistic and musical community. A number of towns have a thriving arts-and-crafts cottage industry. Certain areas have even developed their tourist industry partially or largely around an arts and/or music focus. A number of communities host art/music festivals on an annual basis. Some of the larger ones include the Dixieland Jazz Festival, the Festival of Murals, the Pacific Rim Arts Festival and the Kathaumixw International Choral Festival.

According to Visitors '89, 3.5 per cent (28,600) of non-resident visitors to the Island and 5.4 per cent (100,200) of non-resident visitors to Victoria, identify participation in a festival or cultural activity as one of their daily activities. It is expected that participation by residents is much higher and adds to these figures significantly.

Although it is not known how many people attend art displays or purchase arts and crafts, it is known that 41 per cent of non-resident visitors to the region identify 'shopping' as an important activity. The potential economic benefit of this activity for the arts and crafts industry is significant as visitors to the Island spend 14 per cent of their daily expenditure on the purchase of gifts. Thus non-resident visitors spend more than $16 million annually on the purchase of gifts and souvenirs.

Visitors are showing increasing interest in purchasing regionally produced, quality arts-and-crafts products. This is particularly true for native arts and crafts but also true for other more-generic products. Because of the quality of the arts and crafts resources in the region and the positive spending habits of visitors, the potential for capitalizing on this component of the industry is also positive.

Market Profile:

No information is available regarding the size or characteristics of the arts, crafts and music market. Belief in its development potential is based on an awareness of the increase in the number and popularity of arts and crafts outlets and music events in the region.

Strengths/Benefits:

- The region is becoming renowned for the number and quality of resident artists who live there.

- There are a number of successful, high-profile annual music events already established in the region.

- Encouraging the region's cottage industry will provide additional job opportunities. These jobs are particularly suitable for people who prefer flexible hours and/or for communities where more traditional job opportunities are limited.

- Music and art events and arts-and-crafts outlets, provide an additional tourism focus for a community. They can be developed in virtually any community and encourage visitors to stay longer and spend more.

- Promotion of cottage industries is compatible with the economic development objectives of non-industrial-development-oriented areas such as the Gulf Islands.

Weaknesses/Constraints:

- The quality and ultimate success of the region's arts-and-crafts industry depends almost entirely on individual initiative – the ability and willingness of people to create products and operate a sales outlet.

- "Arts and crafts" is a part-time operation for many individuals, as the income-generating capacity of many artists is limited.

- Music and art festivals often require extensive volunteer participation. In addition, while indirect spin-off benefits may be significant, upfront capitalization is often carried by the organizing group or through grants. Effective advertising can be particularly expensive.

- A lack of scheduling co-ordination among communities can discourage visitors from attending several events in the region.

- Certain areas have difficulty providing accommodation for visitors participating in an event, let alone tourists wishing to attend (i.e., the majority of participants in Powell River's Kathaumixw Choral Festival are billeted). Lack of appropriate accommodation and food services will make it difficult to attract more visitors to such events.

KEY OPPORTUNITY:

- **Encourage the development and presentation of the region's arts, crafts and music industries through art and music festivals.**

Opportunity Definition:

While many perceive arts and music to be tourism services rather than a development opportunity, the potential for using arts, crafts and music festivals to draw visitors, or lengthen their stay, is significant.

The region already plays host to a number of very successful festivals including the Kathaumixw International Choral Festival, the Festival of Murals and the Dixieland Jazz Festival. There is potential both to increase participation in existing festivals and to host additional ones. An assessment of market interest would allow for the identification of the kind of festival not currently held in the region which would have viable market appeal. The region would also benefit from more festivals because of the fact that a portion of both festival participants and spectators would be tourists. An additional benefit of arts-and-crafts shows is that they provide an outlet for local artisans, helping raise their profile and enhancing the viability of cottage-based industries throughout the region. While festival size and focus can range from small highly specialized events to large, general-interest activities, communities need to determine what kind of festivals are feasible and suitable for their location.

Market Focus:

- residents of the region;
- touring visitors; and
- special interest groups.

Public-sector Roles:

- Through the Community Tourism Action Program, and other community-based tourism planning vehicles, encourage communities to assess their potential for hosting arts, crafts and music events.

- Assist communities in determining festival potential by providing relevant market information and highlighting available assessment assistance.

- Continue to provide special-event planning and marketing assistance to communities which opt to host festivals.

Private-sector Roles:

- Work with the public sector to identify the kinds of festivals a community could successfully host, given resource and infrastructure strengths and market potential.
- Plan, finance (through fundraisers, business contributions), market and host festivals.
- Provide appropriate ancillary services — i.e. accommodation, display/performance areas.
- Work with other special event organizers in the region to co-ordinate the timing of festivals so that visitors are encouraged to extend their stay, or move to different areas of the region, in order to participate in more than one event.

Other Arts, Crafts and Music Priorities:

- Develop the Pacific Rim Artisan Village in Chemainus.

5.2 ECOTOURISM/ENVIRONMENTAL TOURISM

Ecotourism trips combine the basic elements of traditional adventure trips with visits to conservation or environmentally sensitive areas. Such trips have an educational focus often with commentary and guiding provided by an "environmental expert".

Public attention regarding environmental issues has yet to peak and will likely continue to gain momentum. As a result, ecotourism is becoming increasing popular. For example, in addition to "soft" and "hard" outdoor adventure trips, a number of tour companies are adding "ecotours" to their product line.

The Vancouver Island/Coast Region has already generated interest in this area with tours to the Carmanah Valley and through the environmental component of the Ecomuseum. In addition to these opportunities, however, the region has many of unique environmental characteristics and areas which could be promoted for tourism purposes. These range from tours of old-growth forests to nature observation sessions in the region's ecological reserves to wildlife viewing.

Market Profile:

Because ecotourism or environmental tourism is a relatively recent phenomena, very little market information exists. It is known that ecotours, and related facilities, have developed in the region in response to public demand, and that participation in ecotours generally, is growing.

If whalewatching is examined as one segment of the ecotourism industry for which a market analysis has been conducted, the following information is available. Of whalewatchers who come to the Tofino and Robson Bight areas, 21 per cent are from the Lower Mainland, 19 per cent are from Vancouver Island, 12 per cent are from the Pacific Northwest, 11 per cent are from Eastern Canada, nine per cent are from Europe, seven per cent are from the prairie provinces, six per cent are from the Western U.S., five per cent are from the Eastern U.S., five per cent are from other B.C. and four per cent are from Southern California.

Of the above visitors, 55 per cent are female and 45 per cent are male, five per cent are under the age of 20, 20 per cent are 20 to 29, 29 per cent are 30 to 39, 19 per cent are 40 to 49, 13 per cent are 50 to 59 and 14 per cent are over 60. A signi-ficant proportion of whalewatchers have university training and income over $60,000. Although the number of people whalewatching is growing annually, ultimate market potential will, like other facets of ecotourism, be limited by the carrying capacity of the resource.

Strengths/Benefits:

- A number of the "environmental" destination areas in the region are considered nationally or internationally significant.
- Developing additional trails will relieve some of the stress on the West Coast Trail and help the region position itself as a quality hiking destination.
- Lack of previous tourist development in many areas means that future tourism activity can be developed in a manner which will ensure ongoing protection and enhancement of the environment.
- Increased visitor awareness of these areas will highlight the need to make adequate official provision for their protection.
- Ecotourism complements and/or balances other development opportunities or strengths in the region including industrial tourism and outdoor/adventure tourism.
- Trend information indicates that participation in those activities which comprise eco-tourism is increasing significantly.
- Ecotourism has multi-season potential.
- The region offers significant wildlife viewing opportunities.

Weaknesses/Constraints:

- Growth of this concept is limited by the carrying capacity of each area.
- Promotion/use of the West Coast will soon be limited by the establishment of a reservation and quota system.
- Provision of access corridors and service facilities could be costly and will not always generate a direct return.
- Protection of environmentally sensitive areas requires a strong, ongoing commitment by both government and those industrial interests whose activities could have a detrimental affect on these areas.
- The construction of quality 'interpretive' facilities is expensive and generally does not produce a direct return. Securing public and/or private funding for such developments can be difficult.
-

- Current motor carrier licensing quota requirements restrict the ability of tour operators to take advantage of opportunities in certain areas.

KEY OPPORTUNITY:

■ **Develop ecotourism through:**
  - **training of qualified guides;**
  - **improving guiding;**
  - **augmenting interpretive facilities;**
  - **improving wildlife viewing; and**
  - **improving access.**

Opportunity Definition:

The Vancouver Island/Coast Region has tremendous potential for the development of ecotourism. The region offers a range of front-, mid and backcountry opportunities capitalizing on existing marine, coastal and mountain resources. This variety of resources supports the development of numerous ecotourism-related opportunities. Although participation in ecotourism activities has been increasing significantly, there are only a few formalized ecotourism participation opportunities in the region. While these are not sufficient to meet public need, most have yet to reach their own operating capacity.

The potential of ecotourism as a development opportunity can be enhanced by:

- Training Qualified Guides

  - Establish an accredited guide training program. Course content and the establishment of standards should be determined in consultation with the private sector.

  - Have tourism training resources available through the Ministry of Advanced Education.

  - Ensure Travel InfoCentre staff are trained regarding the availability of ecotourism opportunities.

- Improving Guiding Opportunities

It is likely that improved guiding opportunities will naturally follow an increase in qualified guides. Nevertheless, a key reason many of the region's ecotourism resources go unappreciated is that people are unaware of their existence or access is difficult and guiding services are unavailable. To address this issue, it is recommended that:

- Potential guiding opportunities should be inventoried, ranked according to degree of difficulty (ie. hiking or canoeing skills required) and classified according to type of activity (ie., wildlife viewing, nature interpretation). Ultimately this information should be compiled into a guidebook for use by the industry and visitors.

- Carrying capacity of potential guiding areas should be assessed. The means of ensuring that guiding activity does not go beyond this capacity, and that tourism activities are environmentally sensitive should be reviewed.

- Improving Interpretive Facilities

Additional interpretation is required to make the region's ecotourism resources more meaningful. Means of doing this include:

- incorporating an interpretive/educational component in the guide training program and in (the) ecotourism guidebook(s);

- enhancing educational services on existing tours — i.e. wildlife viewing; and

- establishing interpretive centres (stand-alone or as a component of existing museums, etc.) in centres near significant ecotourism opportunities — i.e., a whale-centre near Telegraph Cove- which could serve both to inform people about the resources they have come to see and to make passing visitors aware of existing opportunities.

- Improving Wildlife Viewing

See Section 5.10 — Outdoor Adventure.

- Improving Access

Improving access to ecotourism sites is necessary to draw more visitors, but should be done in a manner which maintains the quality of the site in question. Access requirements differ depending on the activity and site in question, therefore consideration needs to be given to determine which access services are most appropriate. However these could include:

- bus or van transportation to the perimeter of an area to discourage individual vehicles;

- trail development;

- improved parking facilities; and

- seasonal marine transportation.

Market Focus:

- affluent, environmentally conscious adults;
- elderhostel;
- specialists — i.e., naturalists, educators; and
- people who enjoy the outdoors.

Public-sector Roles:

- Provide support for, and assist in, the development of an accredited training program in conjunction with the private sector. Co-ordinate the program through the Ministry of Advanced Education and in co-operation with local colleges.
- Assist in the preparation of the inventory and the guidebook.
- Ensure information on ecotourism resources are incorporated into InfoCentre guide training.
- Assist in the planning, funding and operation of community-oriented or regionally oriented interpretive centres or services.
- Have the Environmental Youth Corp. assist in development trails, monitoring activity areas, building interpretive facilities, etc.
- Improve access roads and parking facilities where warranted.

Private-sector Roles:

- Develop, market and operate ecotourism services.
- Work with the government to establish appropriate guide training programs and accreditation standards.
- Assist in the compilation of inventory and interpretive information.
- Enhance interpretive and/or educational services on existing tours where relevant.
- Conduct all tours and ecotourism activities in a responsible and environmentally sensitive manner.
- Provide transportation (van, bus, boat) services to ecotourism areas.

Other Ecotourism/Environmental Tourism Priorities:

- Construct the proposed Discovery Resource and Environmental Centre in the Comox Valley (Black Creek) geared to demonstrating the interrelationship between communities, resource industries and the environment through audio-visual displays, an orientation, workshop facilities, etc. (The potential of this opportunity is premised on the resolution of the current conflict with the local museum.)
- Create a quality whalewatching interpretive centre (research station) in Mt. Waddington's Tsitika Valley. Suggested components include an omnimax theatre and whalewatching tour reservation centre.

5.3 EDUCATION TOURISM

Education tourism involves the availability of tourism opportunities with a partial or complete educational focus. These could range from the interpretive services provided on a whalewatching tour or a lecture on heritage rehabilitation as part of a heritage tour, to a week-long course on native culture catering to elderhostel participants. Very generally, it involves people travelling somewhere, or participating in activities, where they will learn something.

As noted in Section 3, a significant trend occurring in the travel industry is the desire of people to learn something. As a result, many travellers are now planning vacations with an educational component. This is true for all travel groups, especially families and seniors. The Vancouver Island/Coast Region has only just started to capitalize on this opportunity by offering activities such as two- or three-day educational seminars or elderhostel programs. There are definitely some significant opportunities in this area which could be developed to appeal to a number of market segments.

Market Profile:

Growth in education tourism is difficult to measure, as it encompasses so many different components of the industry. Nevertheless, it is apparent that participation in tourism activities with a partial or complete education focus, is increasing significantly. Although origin and other demographic information is not available, it appears that older adults (50 years of age and over) make up a major share of this market. Given the trend to vacations with an educational focus, combined with the aging of the population, the market potential for education tourism is perceived to be strong.

Strengths/Benefits:

- Market demand for educational tourism opportunities is already quite strong.
- Elderhostel programs are multi-seasonal and can be established and operated by one or two people. If accommodation is co-ordinated with established facilities, start-up costs can be minimal. Furthermore, elderhostel programs benefit from the assistance available through the national elderhostel organization in the U.S.
- The region has extensive, quality resources which lend themselves to educational programs and activities.
- Education programs could be run at existing accommodation or resort properties.
- Education has four-season potential.

- Different areas of the region could be used for various types of educational programs.

Weaknesses/Constraints:

- Qualified staff and trainers are required and may not be available in many areas of the region.
- Certification or accreditation may be required to incorporate courses within the existing education system.
- Establishing an effective elderhostel program requires someone with the relevant educational training willing to co-ordinate all related services and activities. Such programs can take time to become established revenue-generating operations.
- Elderhostel programs typically generate low per capita spending.

Education Tourism Priorities:

- Encourage the development of educational programs for the disabled in Powell River as a component of that area's model community program. Specifically, these could include long-term and short-term rehabilitation and retraining programs for the disabled, as well as the establishment of facilities and a training program for seeing eye dogs and dog owners.
- Develop elderhostel facilities and programs throughout the region. These programs could be community-specific or tour-oriented and focus on subjects as anthropology, birdwatching, tidal waters and rainforests, or educational/activity programs which combine, for example, a kayak trip with study of the region's marine life. Facilities could include accommodation, transportation services and meeting rooms.
- Encourage operators developing tours or other programs to incorporate an educational element where appropriate.

5.4 FISHING

Fishing refers to the activities of both salt-water and freshwater fishing. It also includes the range of related facilities and services available to visiting anglers. These include lodges, charter and guiding services, equipment rental and retail outlets, special events such as derbies and after-catch services such as freezing or canning.

Salt-water fishing currently has one of the highest activity profiles in the region. Excellent fishing opportunities in many areas have lead three of the region's communities to identify themselves with some variation of "Fishing Capital of the World". The range of services available to visitors wishing to participate in salt-water fishing is extensive and includes boat rental services, charter operations, rustic to full-service fishing lodges and air access fishing. Virtually every seaside community has a fishing derby of some kind while effort is now being made to "add value" to the sports fishing market. In Port Alberni, for example, a newly constructed cannery will can and ship an angler's catch. In a number of areas, visitors can combine their fishing trip with some other aspect of outdoor adventure such as wildlife viewing, while in Campbell River, Discovery Pier gives more casual anglers the opportunity to try their luck without the expense of chartering a boat.

Freshwater fishing is also popular in the region but is less well serviced than salt-water fishing. At present, freshwater fishing is more popular with area residents than with tourists while salt-water fishing has a stronger non-resident appeal, (although B.C. residents still make up the majority of salt-water anglers). The growing popularity of both freshwater and salt-water fishing is reflected in the sale of fishing licences.

The sale of freshwater fishing licences for the province as a whole grew by nine per cent between 1985 and 1989, increasing from 360,139 to 395,412. During this same period the sale of salt-water fishing licences in the Vancouver Island/Coast Region grew by 25 per cent, increasing from 226,887 in 1985 to 301,490 in 1989. Of non-resident visitors to the region interviewed for the Visitor '89 survey, 44 per cent indicated they would be interested in participating in a fishing charter.

Market Profile:

According to market information contained in a Ministry of Tourism Study entitled 'Fishing Lodges and Resorts in British Columbia', key market characteristics of fishing lodge clients are as follows:

EXHIBIT 5-1

FISHING MARKET PROFILE

	Salt-water (%)	Freshwater (%)	Total (%)
B.C.	23	40	36
Alberta	11	8	9
Other Canada	7	2	4
Canada	41	50	49
Washington	24	17	19
Oregon	8	6	7
California	19	13	15
Mid U.S.	3	3	3
East U.S.	2	2	2
United States	56	41	46
Europe	2	6	5
Pacific Rim	1	0	0
Overseas	3	6	5
Under 20 yrs.	3	9	7
20 - 34	16	19	18
35 - 54	56	42	46
Over 55	24	29	28
Male	79	64	68
Female	21	35	31
Families	8	38	31
Couples	20	30	27
Singles	9	9	9
Groups	64	22	33

For anglers as a whole, the sale of salt-water fishing licences for the Vancouver Island/ Coast region indicates that 67 per cent of salt-water anglers are British Columbia residents, while the sale of freshwater licences for the province as a whole indicates that 72 per cent of freshwater anglers are B.C. residents. As noted above, the sale of licences is increasing noticeably. Given the ongoing availability of quality fishing resources, this trend is expected to continue.

Strengths/Benefits:

- Efforts to improve or add value to the region's sport-fishing industry will encourage repeat visits, increase market penetration and improve word-of-mouth recommendations.
- The fishing resources of the region are excellent and, if proper management continues, will provide quality sports fishing opportunities indefinitely.
- The extensive variety of sports fishing opportunities contributes significantly to the overall appeal of the region as a fishing destination.
- Any effort to add value to the sports fishing industry will generate spin-off benefits and create more jobs.

Weaknesses/Constraints:

- Increased sports fishing may escalate existing conflicts with the commercial fishing industry.
- If action is taken on stated native priorities for fishing, the ongoing development of this industry as a tourism opportunity will be threatened.
- The industry's future is entirely dependent on an abundant fishery resource. Depletion of stocks on the high seas by foreign fishing fleets and catch quotas allotted to all user groups, including the Canadian commercial fleet, sports fishermen and natives are a concern.
- Conflicts between sports fishing communities and between charter associations are negatively affecting potential visitors and are inhibiting the ability to develop a nationally and internationally recognized fishing profile.
- Implementation of size and bag limits without adequate notice negatively affects the sports fishing industry.
- Concern exists about local benefits derived from the rapidly growing numbers of floating fishing resorts versus land-based facilities.

KEY OPPORTUNITY:

■ ***Encourage the development of the proposed Fish Institute of Nanaimo.***

Opportunity Definition:

The Fish Institute of Nanaimo (FIN), as envisioned by its proponents, has two key components. The first is education-oriented while the second is oriented to the provision of tourist information. The education component is comprised of a teaching facility which would instruct tuition-paying participants in how to fish and how to fillet and cook their catch. It would also provide information regarding environmental concerns and fish habitat, lifecycles, biology and feeding habits. The education component would include an aquarium designed by scientists from the Pacific Biological Research Station.

The second component would be a pavilion incorporating a regional tourist information distribution area, other tourism organizations such as the chamber of commerce, a restaurant, and a shop for local artisans.

FIN has the potential to become a strong regional draw and its focus will effectively complement the region's popular sports fishing industry.

Market Focus:

- anglers;
- overseas visitors (European and Japanese); and
- students.

Public-sector Roles:

- Facilitate zoning and building applications.

- Work with the Advisory Committee to identify appropriate design features. Provide planning and development advice as needed.

- Provide marketing advice and assistance for FIN including incorporation of information about FIN in regional and provincial marketing activity. Provide brochures/ guidebooks/maps, etc., for distribution through the pavilion.

- Acknowledge the pavilion as a focal point for the provision of tourist information services.

- Through the Ministry of Environment (Fisheries Branch) provide technical advice and assistance for the preparation of displays and interpretive information if required.

- Encourage the co-operation of area school boards in incorporating relevant elements of FIN in school curriculums. Provide input to the advisory committee regarding the kind of programs and information which would be of most benefit and relevance to students.
- Make all relevant market and trend information available to the developers.

Private-sector Roles:

- Work with the public sector to finalize appropriate design and service features and determine areas of responsibility and a development time-frame.
- Finance, construct and operate the Fish Institute.
- Provide retail and volunteer services as required.
- Secure the participation of area schools and relevant agencies in the preparation of education programs.
- Market FIN in tourist guides, through attendance at travel shows and by securing mentions and reviews in appropriate magazines and programs.

KEY OPPORTUNITY:

■ **Enhance the region's freshwater sports fishing industry through:**
- lodge construction;
- improved access;
- guiding services; and
- fish enhancement.

Opportunity Definition:

Although salt-water sports fishing is one of the region's most significant visitor draws, relatively little has been done to tap into the potential of the region's freshwater fishing resources. Blessed with hundreds of freshwater lakes, first-class scenery and an extensive restocking program, the region offers quality freshwater fishing opportunities. Although a freshwater fishing guide book is available to visitors, most remain largely unaware of the range of fishing options available. In addition, despite quality fishing resources, complementary support services such as lodges and guides are quite limited, while access to many of the best fishing lakes is very difficult.

The likelihood of drawing more visitors through the further development of freshwater fishing services is very high with licence sales indicating strong growth in participation levels even without these additional services. In addition, because this industry is relatively undeveloped, steps toward developing it can be undertaken in a manner which will ensure its ongoing protection.

To enhance the tourism potential of this resource, it is recommended that small, quality freshwater fishing lodges be constructed. While freshwater fishing lodges throughout B.C. range in quality from rustic camps to large, first-class resorts, it is recommended that the Vancouver Island/Coast Region concentrate on smaller to mid-sized, quality facilities which can cater to a number of package options — i.e., three-day full-service (accommodation, meals) trips with optional guide service, to guided day-trips. The location of these lodges should be based on an assessment of access, natural setting and of course, level of steelhead and trout stocks. Some of the best areas include the Qualicum/Port Alberni/Tofino area, the Campbell River/Sayward area, the North Island and the Central Coast.

Access to selected fishing lakes and rivers throughout the region should be improved. Marketing of existing fishing opportunities, lodges and guiding services for visitors should be augmented. Existing guiding services should be enhanced to include a wider range of opportunities (single-day and multi-day trips), enhanced services (pick-up, accommodation, meals, freezing) and a greater choice of fishing locations. An ongoing commitment to the preservation and enhancement of freshwater fishing stocks should remain a priority of the provincial government.

Generally, this recommendation supports the findings of the 1989 study entitled "A Marketing and Development Plan for the Freshwater Fishing Resorts of British Columbia" to which the reader is referred for more detail in this area.

Market Focus:

- B.C. residents;
- corporate executives;
- families;
- Europeans; and
- Washington residents.

Public-sector Roles:

- Continue to operate and enhance freshwater fish cultivation and restocking activities. The trout hatchery expansion proposed for the Cowichan Valley is a positive step.

- Work with the private sector (potential developers) to identify areas suitable for a lodge development.

- Continue publishing "The Lakes of Vancouver Island: A Fishing Guide." More detailed maps would be helpful.

- Provide improved access roads and services, if available, to selected lodge development sites and/or lakes/rivers identified as having good tourism potential. Because many fishing lakes are on property controlled by Tree Forest Licences or in parks, the lakes/rivers most suitable for development would be those which are located on Crown Land and meet the fish stock, scenery and access criteria discussed earlier. Guarantee of long-term tenure may be required to convince would-be investors to build quality infrastructure on Crown Land.

- Facilitate land-use and building applications (Crown Lands).

- Emphasize freshwater fishing opportunities in marketing activity and at fishing trade shows.

- Work with developers and operators to address potential financial problems associated with the seasonality of the freshwater fishing industry — i.e., review other activity options to extend revenue-generating ability.

- Make information regarding development opportunities available to potential investors.

- Make potential operators aware of guide training opportunities and business and marketing plan preparation assistance. Keep operators apprised of available market information.

- Institute a grading/classification system for the freshwater fishing industry.

Private-sector Roles:

- Work with the public sector to identify opportunities to improve or provide freshwater fishing lodges and/or guiding service.

- Plan, finance, develop, and operate new guiding services and lodge facilities.

- Contribute to the improvement of access services if required.

- Prepare a business and marketing plan for presentation to potential investors.

- Provide information regarding freshwater fishing service to appropriate tourism publications. Participate in travel and fishing shows, and other marketing activities, as appropriate and feasible.

- Actively participate in the B.C. Freshwater Fishing Resorts and Outfitters Association in order to address common concerns, to provide a unified voice and marketing thrust for the industry, and to remain apprised of market trends.

- Work with other tourism services in the area to promote co-operation, develop activity packages and generate spin-off visits.
- Monitor visitor demographics in order to facilitate the preparation of regional and provincial trend and market information.
- Incorporate displays and information pertaining to freshwater fish and fishing in the Fish Institute of Nanaimo.

Other Fishing Priorities:

- Ongoing upgrading and/or maintenance of many charter and lodge operations (facilities and service) to maintain competitiveness with other fishing destinations.
- Continue to "add value" to the sports fishing industry (small canneries in Mt.Waddington and Powell River).
- Build a first-class fishing lodge in the Bella Coola area.
- Encourage development of fishing resorts on the West Coast and in Mt. Waddington.
- Expand guiding and charter services in Clayoquot Sound.
- Expand helicopter fishing opportunities in the north Island and mid-coast area of the region.

5.5 GOLF

Golf tourism reflects the use of the region's golf facilities to draw visitors or keep them in the area longer. It includes casual green fee and organized tournament play, as well as related services such as golf-oriented accommodation facilities, equipment retail and rental outlets and golf tour packages.

It is well known that golf is one of the fastest-growing participatory sports in North America. The 1980s produced the largest increase in the number of people playing golf, the number of rounds played, and the amount of money spent in the industry, since the game was introduced to North America.

The Canadian Golf Foundation has observed that if golf course construction continues at its current rate, there will be a shortage of 400 courses by the year 2000. On average, 48,000 rounds are played per course in the province. This implies that, given present demand, British Columbia can support another 30 courses, while the Vancouver Island/Coast Region can support another seven or eight.

At present, there are 39 golf courses in the region and another four to six in various stages of planning or development. Of the existing courses, 15 are 18-hole and 22 are nine-hole.

Approximately 13 per cent of golf rounds played in the region are generated by tourists. Canada presently draws approximately four per cent of the total golf vacation market. According to the study 'Golf Tourism in British Columbia', this is an impressive figure, given the profile of U.S. courses and the lack of marketing by Canadian courses. A high proportion of this golf vacation activity takes place in British Columbia, and in the Vancouver Island/Coast Region specifically.

Recently the PGA sanctioned British Columbia as one of five official golf destinations in the world. Despite the potential of this activity, relatively little is currently being done to capitalize on the opportunities presented by golf tourism. The Vancouver Island/Coast Region has the potential to benefit significantly from the effective promotion and packaging of existing golf resources and the development of new courses.

Market Profile:

At present, approximately 1.8 million rounds of golf are played annually in the Vancouver Island/Coast Region. Of these, approximately 240,000 are generated by visitors. In Canada overall, the number of golf rounds played is increasing by 15 per cent annually. Over the past 20 years, the number of people playing golf grew by 2.5 per cent annually. Between now and the year 2000, growth is expected to be in the six per cent range.

Close to 80 per cent of golfers are male. Just over one-quarter are retired, although the median age is 49. More than two-thirds of golfers have at least some university or college training, and the majority are in an upper income bracket.

Strengths/Benefits:

- Golf course construction/operation produces a range of community, environmental and economic benefits including: employment generation, enhancement of the tax base, preservation of open space, provision of a recreation facility, augmented property values, and the creation of spinoff employment and revenue-generating opportunities.
- Construction of additional quality golf courses will enable the region to capitalize on the golf vacation profile generated by the PGA designation.
- The existence of a range of quality courses relatively close together, will allow the region to compete more effectively against existing golf destinations such as California, Arizona and South Carolina.

Weaknesses/Constraints:

- There is some opposition to additional golf course development by residents of the region.
- Golf course development requires extensive capital investment.
- Zoning restrictions and lack of suitable land discourage golf course development in certain areas.
- Extensive, co-operative marketing is required to raise the tourism profile of the region's golf resources.
- Some areas lack the accommodation and/or ancillary facilities necessary to service a destination golf course or golfing area.

KEY OPPORTUNITY:

■ **Develop the Vancouver Island/Coast Region as a world-class golf destination.**

Opportunity Definition:

Given projected golf participation growth trends of six per cent annually, it has been estimated that the Vancouver Island/Coast Region could support an additional seven or eight golf courses. Even if the proportion of golf rounds generated by visitors stayed at 13 per cent for the next decade, and increase in total visitor levels similar to that which occurred between 1979 and 1989, would see the number of visitor-generated golf rounds increase from approximately 240,000 to more than 420,000. This increase alone could support the construction of four new golf courses.

In order to fully capitalize on this potential, and to compete effectively against more-established golf destinations, effort should be made to encourage the development of additional, quality golf courses and/or destination golf resorts. Attracting golfers and enhancing the region's destination appeal can effectively be done by building visitor-oriented, 18-hole golf courses in scenic locations.

The courses should be close to appropriate, quality accommodation facilities or include an accommodation component. (This opportunity could be linked to the development of a destination resort and include other recreation facilities in addition to a golf course.) Potential locations for additional golf course development include:

- Sidney;
- Cowichan Valley;
- Nanaimo/Parksville and
- Comox Valley.

The Comox Valley would be most suited to a golf resort development. In addition to new golf courses and resorts in the above locations it is suggested that a full-service hotel be built as part of the Powell River Myrtle Point Golf Club.

Market Focus:

- tour groups;
- destination visitors/golfers;
- casual golfers; and
- residents.

Public-sector Roles:

- Work with communities to identify prime golf course development areas.
- Capitalize on B.C.'s designation by the PGA and emphasize the region's golf resources in provincial marketing activity.
- Assist in identifying and matching investors with golf course and resort development oppor-tunities.

- Ensure that the formula of funding programs for which public golf course developments are eligible (GO B.C.) address construction cash flow requirements.

- Make relevant market and marketing information available to developers.
- Facilitate zoning requirements as necessary and appropriate.

Private-sector Roles:

- Finance, construct and market golf courses and resorts.

- Work with other tourism operators and wholesalers to create golf packages and circle tours.

- Maintain a quality, updated golf destination guidebook for the region, describing facilities, packages, ancillary and transportation services, etc.

- Provide appropriate ancillary services and facilities.

5.6 HERITAGE TOURISM

The heritage resources of the Vancouver Island/Coast Region provide an excellent foundation for the promotion of heritage as a tourism development theme. According to the Vancouver Island Tourism Monitor, close to 40 per cent of all tourists to the Island visit a historic site during their stay, while 70 per cent of respondents to the Visitor '89 Survey indicated they would be very interested in taking a heritage tour. It is likely this figure is applicable to the Powell River and Central Coast regional districts as well. Virtually every major aspect of the region's history is represented by existing heritage resources, including many structures which have been restored or preserved. Heritage homes, schools, churches, equipment, industrial and native structures illustrate the region's social, educational, spiritual, and economic history.

Victoria has the greatest concentration of heritage resources and structures in the region. Many of these have been operating as tourist attractions for years (Craigflower Manor, Craigdarroch Castle and Chinatown). Other significant heritage areas or sites include Ladysmith's revitalized heritage area and Railway Museum, the Powell River "Mill Town" area, the Nanaimo Bastion, Newcastle Island, the Alexander Mackenzie Heritage Trail and Fort Rupert. In addition, the region has a significant number of community and thematic museums, as well as an extensive range of archaeological sites.

Heritage is enthusiastically supported by many of the region's residents. In Nanaimo, for example, residents raised $200,000 of the $250,000 needed to refurbish the Nanaimo Bastion. It is expected that the potential for this kind of community involvement throughout the region is strong. The region has also been experimenting with some innovative approaches to heritage. A key example of this is the Ecomuseum in the Cowichan Valley. While this, and other heritage resources offer quality heritage experiences, numerous facilities could benefit from improved interpretation and the development of marketing packages.

Market Profile:

The Visitors '89 Vancouver Island/Coast special run information indicates that of non-resident visitors to the region, 26 per cent identify visiting a museum or historic site as one of the daily activities in which they participate. If this percentage is applied against the total number of travellers to the region, then it can be estimated that 1.3 million people visit the region's heritage resources. Visitor '89 survey data also provides information regarding the proportion of non-resident visitors from different areas who visit a historic site or museum while in the region. These are as follows:

	Per Cent
Alberta	33
Ontario	23

	Per Cent
Other Canada	25
Washington	29
Oregon	37
California	34
Other West. U.S.A.	36
Other U.S.A.	44
International	20

Strengths/Benefits:

- Many of the region's most significant heritage resources have already been restored for tourism purposes but require improved marketing or programming activities to draw more visitors.
- Heritage theming can easily be developed/promoted because of the range of heritage resources throughout the region.
- Enhancement of heritage resources in the region's more rural areas will provide the kind of additional draw these areas need to encourage visitors to explore more of the area, and thus extend their visit.
- regions or communities which have developed their heritage resources for tourism purposes have been successful in enhancing their tourism profile (Revelstoke, Nelson and Rossland).
- Both the federal and provincial governments have highly successful heritage rehabilitation programs, which can be accessed by the communities in the region.
- Heritage attractions provide an off-season activity option.

Weaknesses/Constraints:

- Heritage rehabilitation can be expensive and generally does not generate a direct or immediate return.
- Visitors are not being made aware of the range or location of the heritage resources in the region.
- It is very costly to maintain some heritage resources.
- To date, only limited effort has been taken to pursue a unified approach to heritage development and promotion in the region.

- Some areas may lack people with the skills necessary to undertake heritage revitalization projects.
- Current heritage signage is inadequate.
- Restoration of a lone heritage resource, unless it is significant, will have only limited impact on a community's ability to draw more visitors to their area.
- Numerous heritage sites have been subjected to vandalism. This concern will have to be addressed as new sites are identified and developed for public viewing.
- Current marketing of heritage attractions is inadequate. Additional information handouts and brochures are required.
- There is not enough emphasis on the use of guides in period costumes at heritage attractions to enhance their visitor appeal.

KEY OPPORTUNITY:

■ **Retain the E and N Railway and right-of-of way to offer heritage tours during the summer and shoulder seasons (and ski commuter services in the winter).**

Opportunity Definition:

Wherever they are, operating steam trains are of great interest to many visitors. With the existence of the E and N railway running between Victoria and the Comox Valley, the region is in an ideal situation to offer heritage rail tours up and down the Island using a refurbished steam train. The train line passes through areas which have significant natural, industrial and structural heritage value. This would allow for the creation of general or more-focused tours. The route the railway follows further lends itself to developing tours of varying lengths and to the creation of combination tours.

The creation of such tours would help spread visitation throughout the region, would increase visitors' awareness of the range of opportunities available, and would extend length of stay. While the constraints to developing this opportunity seem high, the potential benefit is significant.

Market Focus:

It is likely heritage steam train tours will be of interest to a significant cross-section of the travelling public, with cost being the limiting factor for some families and visitors on a budget. Particularly strong market potential exists among:

- specialists;
- overseas visitors;
- Americans; and
- seniors.

Public-sector Roles:

- The provincial government should continue to encourage the federal government to maintain the E and N Railway between Victoria and the Comox Valley.
- Pending the positive outcome of the current court case, the government should encourage and facilitate private-sector applications for the use of the line to offer steam train tours. Application approval should be premised on agreement regarding appropriate line-use fees and the right to use supporting infrastructure (stations and ticket counters).
- Monitor safety and service standards.
- Provide relevant market profile information to the operator. Incorporate reference to the steam train in community, regional and provincial heritage, tour and general visitor information.

Private-sector Roles:

- Develop, market and operate heritage steam train tours.
- Adhere to all government-established safety standards and other relevant regulations.
- Encourage the co-operation of local heritage groups and other tourism operators in the development of interpretive information, and possibly also act as volunteer guides on the train.
- Provide appropriate ancillary services (transportation and food services).

KEY OPPORTUNITY:

■ **Capitalize on special heritage events such as the Alexander MacKenzie Bicentennial and the arrival of the Spanish at Friendly Cove.**

Opportunity Definition:

Well-run celebrations or festivals focusing on historical events have potential to draw many one-time visitors to areas they might not otherwise visit. The history of the Vancouver

Island/Coast Region includes a number of significant historical events which lend themselves to the hosting of special events. Generally, heritage events with the greatest potential are those celebrating a centenary or bicentenary. These could range from marking the arrival of famous explorers to celebrating the founding of a city or community.

Within the next couple of years, the region will be marking the 200th anniversary of Alexander Mackenzie's arrival at Bella Coola, as well as the 1992 centennial celebration of the arrival of the Norwegians in Bella Bella, the 1992 re-enactment of Captain Vancouver Voyage of Discover, the annual celebration of the arrival of English coal miners in Nanaimo, and the 1992 celebration of the Spanish at Friendly Cove. Efforts are already underway to celebrate these events in a manner geared to drawing visitors or keeping them in an area longer. Despite these efforts, more can be done to capitalize on such special heritage events and enhance their tourism potential. Ultimately, the number of people who attend will reflect the quality and extent of the event and how well it is promoted.

Market Focus:

- visiting friends and relatives;
- families;
- specialists/historians; and
- residents of other areas in the region.

Public-sector Roles:

- Inventory special heritage dates to occur during the next decade and inform heritage groups and tourism associations in relevant local communities of their tourism potential.
- Assist the Alexander Mackenzie Bicentennial and other planning groups through the provision of technical services (costuming) and marketing and strategy advice, and by arranging for the temporary loan and display of relevant artifacts when available.
- Work with local communities to identify and co-ordinate tour options and infrastructure requirements.
- Incorporate special-event information into marketing activity (travel guides, trade shows).

Private-sector Roles:

- Plan, host and help finance (fund raisers, business contributions) community-oriented special heritage events.

- Provide volunteers for all stages of the event.

- Research the history of the event for use in preparing interpretive information, doing re-enactments, etc.

- Provide ancillary services (accommodation and transportation).

- Co-ordinate the development of package tours both within the community focusing on a special event (accommodation, transportation and event participation) and within the region focusing on the special event as one of several components of a circle tour.

- Ensure special events are well-planned, well-promoted, and authentically presented.

Other Heritage Tourism Priorities:

- Complete construction and interpretation of the Alexander Mackenzie Heritage Trail in co-operation with the Cariboo Tourist Association.

- Continue development of the Ecomuseum, with emphasis on the forestry theme, as justified by its impact on the tourism industry.

- Refurbish a cannery in Ocean Falls on the Central Coast as a static display of coastal industrial history, or as the site of an operating sport cannery interpretive centre and retail outlet.

- Improve interpretation facilities relating to the paleontological resources of the Courtenay/Cumberland area.

- Develop the R.B. McLean Sawmill in Port Alberni as an operating mill including a rail link to connect the McLean Sawmill with Harbour Quay. Use the 2 Spot heritage train to transport people between the two sites.

- Continue development of the Ladysmith Heritage Harbour.

- Develop a railway museum.

- Restore and interpret the heritage resources of Newcastle Island.

- Develop the Powell River townsite project including heritage bed-and-breakfasts, restaurants offering 'heritage' meals and special events focusing on relevant activities.

- Preserve and present significant archaeological sites (Friendly Cove, Keeshan, Bella Coola, Thorsen Creek, Namu, Nanaimo Petroglyphs).
- Recreate Chinese heritage sites in Cumberland.
- Refurbish Suquash Mine.
- Refurbish the Telegraph Cove Sawmill.

Where appropriate, interpretation of these sites and events should emphasize the use of guides in period costumes and/or live demonstrations and skits.

NOTE: For further explanation of other heritage opportunities, readers are encouraged to refer to a study undertaken concurrently with this project. Entitled "Vancouver Island/Coast Economic Development Region: Heritage Tourism Study", this study was completed by Commonwealth Historic Resource Management Ltd. and sponsored by the Heritage Conservation Branch of the Ministry of Municipal Affairs, Recreation and Culture. The mandate was to investigate the heritage aspects of the tourism marketplace in the Vancouver Island/Coast Region and to provide recommendations for enhancing heritage related tourism in the region.

5.7 INDUSTRIAL TOURISM

'Industrial tourism' implies that industrial resources and infrastructure are, or can be, used as tourism attractions. These might include pulp and paper mills, active forestry operations, mines and aquaculture farms. These facilities can be operating or static. Tours are the major visitor service provided.

The presence of an extensive industrial infrastructure, combined with apparent visitor interest in observing, experiencing and learning about industrial activity, indicates that the concept of "industrial tourism" has significant potential in the Vancouver Island/Coast Region. Industrial tourism is also closely related to the promotion of heritage as a development theme, as much of the region's heritage is based on industry.

The region is most strongly represented by the forestry industry with mill and/or logging tours already operating in several communities and areas including the Capital Regional District, Cowichan Valley, Nanaimo, Port Alberni, Powell River, Campbell River and Mt. Waddington. Other industries, such as mining, fishing and aquaculture have not been utilized for tourism purposes to the degree that forestry has, although the opportunity exists.

Market Profile:

There is no specific market information available for industrial tourism. Conversations with mill and forestry tour operators indicate that many tours are fully booked and demand is increasing steadily. General observations appear to indicate that many of the participants are not residents of British Columbia.

Strengths/Benefits:

- Some of the region's best industrial tourism resources overlap with heritage (Suquash Mine and Newcastle Mine) and offer significant opportunity for joint theme development and interpretation.

- The further development of industrial tourism will provide an additional tourism focus for the region. The quality and extent of industrial tourism opportunities should be successful in keeping visitors, especially the touring market, in the region longer. It will also assist in attracting that growing segment of the tourism market which is interested in the experiential or educational aspects of a holiday.

- Existing tension between the region's primary industry and tourism should lessen as the two sides recognize the benefit of working together.

- Because much of the infrastructure for promoting the forestry industry as a tourism opportunity is already in place, investment requirements will be comparatively small. Furthermore, this successful "tourism attraction" is being largely developed and funded by the forest companies at no cost to the government, taxpayers or visitors.

Weaknesses/Constraints:

- The capacity of the forestry companies to handle tours and interpretive facilities is limited by funding, safety and operational efficiency considerations.
- The continuation of forestry and mill tours depends on the ongoing support of the forestry companies.
- Restoring industrial heritage resources (i.e., old mines, mills) for tourism purposes can be very costly.
- Securing participation among other industries will be difficult, as they are not under the same public relations pressure as the forestry companies. In addition, while forestry tours have the financial backing of major companies, the fishing, aquaculture and farming industries are largely comprised of private operators who may be far less likely to have the time, funding or inclination to participate in such a concept.
- The location of industrial tourism opportunities in more rural areas will detract from their ability to be economically viable – especially in the short term.

KEY OPPORTUNITY:

■ **Develop farm holiday opportunities.**

Opportunity Definition:

Although farm holidays are very popular in other areas, notably New Zealand, Australia, Quebec, parts of the U.S and, to a lesser extent, the interior of B.C., only limited opportunity exists to participate in a farm holiday in the Vancouver Island/Coast Region. Because the region has strong dairy, agricultural and animal farming sectors, the potential for developing farm holiday opportunities is strong. A noticeable travel trend indicates that visitors are increasingly interested in learning how residents live and in using their vacation as a learning experience. Farm holidays are a way to address these travel needs.

In addition to giving the region a new market focus, farm holidays provide farmers with additional revenue. Similar to bed-and-breakfast facilities, farm holidays typically involve the provision of accommodation and breakfast services, plus the opportunity to watch, or assist with, farm activities. Capitalizing on this opportunity involves:

- Encouraging participation of the region's farmers — the most appropriate areas are the Saanich Peninsula, the Cowichan Valley and the Comox Valley. Participating farms would need to have appropriate accommodations facilities.
- Developing farm "circle tour" opportunities — i.e., the opportunity to stay at farms throughout the region in conjunction with, for example, cycling or walking tours.
- Developing a farm holiday guidebook.

Market Focus:

- families;
- overseas visitors; and
- couples.

Public-sector Roles:

- Undertake an assessment of farm holiday market potential and visitor expectations to provide background information for interested operators.
- Make the farming community aware of the opportunity for hosting visitors. A letter and/or workshop could be used to assess interest, identify facility requirements, provide start-up, advise, etc.
- Facilitate any licensing and building applications required.
- Compile and publish farm holiday information — i.e., in existing guidebooks.
- Where appropriate, incorporate farm holidays in marketing activity.

Private-sector Roles:

- Develop, market and host farm holiday opportunities.
- Make opportunity information available for incorporation in local, regional and provincial marketing activity.
- Co-operate with other participating farm operators to establish service standards, and develop circle tours and referral services.

KEY OPPORTUNITY:

- **Ongoing development and promotion of existing mine or forestry tours including expansion of interpretive facilities and enhancing awareness of the Canfor steam train tours at Woss.**

Opportunity Definition:

Started by forestry and mining companies to educate the public about industrial activity, mining, and especially forestry tours, have become very popular in different areas throughout the region. Conducted by company staff or retired foresters, these tours generally take visitors through various active areas of the operation. In some cases these tours are supplemented by visitor oriented displays and/or boat or train rides. Funded by the participating companies and offered free of charge, these tours are drawing an increasing number of participants.

As with farm holidays, industrial tours meet various visitors' desire to see how residents live and to learn something. For many visitors, the opportunity to see heavy industrial machinery in operation is very appealing and feedback given to existing tours indicates that this opportunity complements, rather than detracts from, the region's "super natural" appeal.

Although several forestry tours already operate close to capacity, and although the resources companies have to contribute to the tour program are naturally limited, the potential to focus on industrial tours as a visitor draw throughout the region is strong.

Enhancing the potential of this opportunity involves increasing tour capacity (more-frequent tours) and augmenting static interpretive displays at forestry operation sites in Powell River, Alberni-Clayoquot, Comox-Strathcona and Mt. Waddington, and at the mining operation in Comox Strathcona. (Note: Static displays can be located away from the tour site — as in Pt. Alberni, — and used as a means of raising awareness of tour opportunities and booking tour participants.) Increasing awareness of the opportunity to ride the Canfor Steam Train at Woss could encourage more people to stop on their way to or from the Prince Rupert ferry and to spend more time on the North Island.

Market Focus:

- non-B.C. residents;
- families;
- retired foresters and miners; and
- seniors/elderhostel.

Public-sector Roles:

- Incorporate information on industrial tours in regional and provincial marketing activity.
- Assist in conducting an assessment of visitors' "willingness to pay" for an industrial tour to determine whether tour fees could be implemented to help subsidize operating costs.
- Provide assistance (research and planning) for the development or expansion of visitor-oriented displays and interpretive information.
- Incorporate information on industrial tours in InfoCentre staff training programs.
- Make employment grant or wage subsidy programs applicable to companies who hire visitor guides. This would enable them to, for example, hire more retired foresters, keep active loggers working on site, and, subsidize the cost of running the tours — a factor which may cause the companies to consider suspending the tours if the economy remains weak.
- Provide appropriate directional signage.

'rivate-sector Roles:

- Continue to fund, market, operate and, where relevant, expand industrial tour opportunities.
- Provide tour information to local, regional and provincial visitor centres and publications.
- Continue to operate and improve existing interpretive facilities and to work with the public sector in the development of additional facilities.
- Co-operate with regional or local tour operators wishing to, for example, include an industrial tour as part of a package tour itinerary.

Other Industrial Tourism Priorities:

- Offer tours of aquaculture operations.

5.8 MARINE/WATERFRONT DEVELOPMENT

Marine/waterfront development refers to the development or expansion of marina facilities to provide moorage for visitors travelling in the region by privately owned power boats or sailboats. It also refers to the provision of services to meet the needs of marine visitors. These could include fuel, groceries, marine supplies/repair services and land-based accommodation. Furthermore, this category includes services designed to encourage visitors to participate in marine-based activities such as canoe and kayak rentals.

The Vancouver Island/Coast Region offers outstanding salt-water marine recreation development potential. The inland waterway between Vancouver Island and the Mainland, as well as the West Coast, provides excellent opportunities for recreational boating, including canoeing and kayaking, as well as diving and fishing (discussed separately). The area is noted for its scenic beauty, numerous safe harbours and fiords, lack of pollution,and variety of boating opportunities.

The number of residents and non-residents participating in each of the above opportunities appears to be increasing annually. For example, Western Canadian operators involved with servicing kayaking and canoeing project an 18 per cent annual growth rate for their industry, while this rate is nine per cent for scuba diving, 21 per cent for sailing tours and 24 per cent for boat tours.

These documented increases were confirmed by tourism spokespersons throughout the region who commented on significant increases in the number of pleasure boaters and an explosion in the number of canoers and kayakers. Virtually every coastal community contacted made reference to the need to upgrade, expand, or develop marine recreation related services. Many communities noted that demand for marina space far exceeds supply and that marinas which have been constructed recently are already fully utilized.

Market Profile:

Once the marine coastal study currently underway for the Ministry of Development, Trade and Tourism is completed, it is likely thorough market information for this sector of the industry will be available. Current data indicates that there are close to 300,000 privately owned pleasure vessels registered in the Pacific Northwest. As a result, the majority of people participating in the boating component of marine tourism are likely to be residents of this area. It is expected that a high proportion of boaters are middle-aged to older adults who earn a high income and are well educated.

A survey of marinas indicated that the majority of their clients (61 per cent) identify sports fishing as their primary activity, while 12 per cent identify power cruising and seven per cent identify sailing. It is expected that the potential to draw more Americans is strong, especially for boating.

Strengths/Benefits:

- Growth projections for every component of marine recreation are strong.
- Additional marina development will augment the appeal of the region to both the American and Canadian recreational boater market, while the emphasis on related services and activities will encourage visitors to stay longer and spend more money.
- The region has the coastal scenery, beaches, harbours, wildlife/nature viewing opportunities and marine parks needed to effectively market its marine potential.
- Marina development will draw other activities - i.e., pocket cruises.

Weaknesses/Constraints:

- Marina development is subject to the control of a range of public bodies and legislative guidelines. This 'red tape' discourages development.
- Marina development requires extensive investment and an ongoing upgrading commitment.
- Current problems regarding garbage collection/disposal need to be addressed especially in the more isolated marinas.
- A strong marketing campaign emphasizing the quality of the region's marine tourism resources is required to overcome perceptions of access problems and to meet the competition generated by boating and scuba destinations elsewhere.
- Many recreational boaters bring most of their own supplies and thus spend less in the region than land-based visitors.
- The region's weather is not conducive to year round boating.
- Despite growth in the canoeing and kayaking markets, the physically demanding nature of these activities limits its market potential.
- There is a shortage of skilled canoe and kayak guides, especially in the region's smaller communities.
- Ongoing growth of the marine tourism industry depends on maintenance of scenic, pristine coastal views. Visible forestry activity will discourage recreational boaters.

- Significant growth in recreational boating could cause increased conflict with the aquaculture industry and with commercial fishing vessels. It could also result in increased marine pollution and harbour congestion.

- The requirements for operating a commercial boat tour operation are very stringent. The resulting expense makes it difficult to operate a viable seasonal boat tour operation.

- Some boaters may be discouraged by the distances between destinations and the isolated nature of much of the region's coast.

KEY OPPORTUNITY:

■ **Build another marina in the Comox-Courtenay area.**

Opportunity Definition:

Exploding demand for dock space in Comox-Strathcona needs to be addressed if the area is to meet the needs of its recreational boating and sports fishing industry. Although a new marina is currently being built in Campbell River, an increasing number of anglers and pleasure boaters are being drawn to the Comox-Courtenay area. Given the current lack of dock space, keeping these visitors in the area is difficult.

A marina built in this area should provide a full range of services. The marina should cater to sports anglers and pleasure boaters but include space for permanent and commercial fishing moorage as well. Services should include marine repair and fuel services, showers, a convenience store and, ideally, be within walking distance of a commercial area.

Market Focus:

- sports anglers; and
- pleasure boaters.

KEY OPPORTUNITY:

■ **Support the proposed improvement of the Maple Bay Marina.**

Opportunity Definition:

The current Maple Bay Marina is situated in sheltered Maple Bay off the well-travelled Sansum Narrows which runs between Saltspring Island and Vancouver Island. The current development proposal calls for large-scale improvement and expansion of the existing docks and onshore infrastructure to better cater to non-resident pleasure boaters. Given the marina's location in a quality cruising and sailing area, the increase in the number of pleasure boats cruising the waters around Southern Vancouver Island and the lack of marina space outside Victoria which can accommodate larger pleasure vessels, the market potential for this development appears strong and should be encouraged.

Market Focus:

- pleasure boaters; and
- residents of the Pacific Northwest.

Public-sector Roles:

- For Courtenay-Comox, work with the community and developers to select an appropriate location for the marina development.
- Facilitate necessary zoning and development applications.
- Provide service hookups (power,water) and improve access roads if necessary.
- Provide marine tourism market and trend information to developers and operators.
- Provide harbour master and other regulatory services.

Private-sector Roles:

- Conduct a market assessment to determine marina potential, identify design and service requirements and ensure effectively targeted marketing activity.
- Design, secure financing for, construct and operate the marinas.
- Work with the public sector to determine, where relevant, appropriate location, dock use requirements, building standards and design features.
- Provide and operate ancillary services — transportation, groceries, marine repairs, etc.

KEY OPPORTUNITY:

■ **Encourage the development of a seasonal pocket cruise ship industry.**

Opportunity Definition:

The Vancouver Island/Coast Region is already recognized as a premier cruise destination by several of the major cruise lines. Numerous large cruise ships travel the Inside Passage carrying tens of thousands of visitors between Mainland U.S. ports and Alaska. Over the years these cruise ships have stopped at one or more B.C. ports. However the number of stops has been reduced as the average length of trip has decreased from 10 days or two weeks to between three and seven days. While these cruises have been a positive economic boon to selected communities, it is apparent that a significant opportunity to bring more cruise ship passengers to the region is being missed.

The scenery, range of marine activities, and onshore points of interest in the region, make it ideally suited to the development of a pocket cruise ship industry which offers three- to seven-day tours that originate and operate in B.C. Ideally, the cruises should begin in an urban area such as Vancouver, Victoria or Nanaimo and use ships which carry between 50 and 200 passengers.

There are a significant number of potential route options and tour theme possibilities. These include Gulf Island cruises, urban cruises (i.e., Victoria, Nanaimo, Powell River and return) and cruises connecting the North Island with coastal communities such as Bella Coola, Bella Bella and Ocean Falls. These cruises should offer full services and first-class facilities and have schedules which allow several hours at each port of call.

Generally, this strategy endorses the recommendations of the 1990 study entitled "Small Ship Cruising in British Columbia: Market Demand and Product Assessment," to which readers are referred for more information on this tourism sector.

Market Focus:

- middle-aged to older people;
- upper income earners;
- Americans; and
- special interest groups (for theme cruises).

Action Steps:

Although it is largely up to the private sector to implement pocket cruises in the region, the public sector has a significant role to play in the development of this opportunity. Without full government involvement it is unlikely that either existing operators (major cruise lines) or new operators, will be willing to commit the investment required.

Public-sector Roles:

- Make cruise companies and potential investors aware of the market potential of pocket cruises in the region — i.e,. market size, demographics, cruise ship facility requirements and destination preferences.

- Facilitate application and operational requirements (provision of pilotage services and docking and fuel facilities).

- Develop a fee structure which accurately reflects the size of a vessel and its ridership and is reasonable given the onshore and dock services provided.

- Review the process for determining the charges applied against non-duty paid vessels operating in B.C. Many operators cannot afford the upfront charges associated with operating a foreign-registered vessel in Canadian waters.

- Highlight pocket cruise opportunities in marketing activity.

- Work with the private sector to make tour wholesalers aware of pocket cruise opportunities.

- Make all relevant market and product information available to potential operators.

- Work with potential operators to familiarize them with applicable regulations and to assist them through the system.

Private-sector Roles:

- In co-operation with the public sector, and based on a thorough review of product and market information, develop pocket cruise tour itineraries for the region. Identify infrastructure and service requirements which need to be addressed and assign responsibility and a timeframe for meeting these requirements.

- Provide high-quality vessels, and related tour services (transfers and onshore excursions)

- Market and operate the pocket cruises.

- Work with local communities to identify service needs and capabilities (garbage collection) and onshore tour and visitor requirements (quality attractions and restaurants).

Other Marine/Waterfront Development Priorities:

The region can support a number of additional mid-sized marinas, while supplementary services and facilities are required, and/or would enhance the viability and appeal of, existing marinas. Specifically:

- A marina is needed in the Powell River area to meet increasing demand and to further enhance the area's market appeal to recreational boaters. The Powell River area provides the only marina and fuel services between Pender Harbour and Desolation Sound, yet provides no other accessible, ancillary services which would entice boaters to stay in the area longer or spend more money.

- The development of a mid-sized marina and accommodation complex in Chemainus would appear realistic.
- The development of the proposed Ladysmith harbour front marina should include fuel and some marine services. The connection of the marina, waterfront and railway museum development together with the proximity of this area to Ladysmith's downtown, will allow for the creation of both walking tours, incorporating the waterfront and downtown areas, and for the eventual development of charter and boat tour services.
- Support the expansion of marina facilities and space in Nanaimo.
- The proposal to add 300 dock spaces in the Alberni Inlet/Port Alberni Harbour area should be implemented. Expansion of existing facilities is a viable option as support services are already in place.
- Encourage/support completion of the Port of Sidney marina development.
- A mid-sized marina, with expansion potential, should be a tourism development priority for the Mt. Waddington area. Port McNeill would be most suited to this development, although both Port Hardy and Sayward would also benefit from marina upgrading. Marina development in Port McNeill should include fuel and marine services, showers, and easy access to restaurants and a grocery store.
- Ongoing upgrading of existing marinas needs to be encouraged (Port Hardy and Parksville/Qualicum).
- Establish a seasonal cruiseship run between Bella Coola and Port Hardy (utilizing an automobile accommodating vessel). This would create an appealing circle tour option.

5.9 NATIVE CULTURE TOURISM

Native culture tourism refers to using the region's native culture resources as a tourism 'attraction'. Like heritage, native culture tourism can be broadly defined to include native history, art, festivals, artifacts and culturally significant structures. Native culture can be interpreted for visitors in many ways. These include art galleries and demonstrations, the First Nations Festival, museum displays, longhouse construction and certain activity opportunities such as native fishing lodges and ocean-going canoe trips.

During the past few years, the region's native community has become increasingly involved in the tourism industry. This involvement ranges from the management and operation of campgrounds, gift shops, and art galleries to the organization of special events (First Nations Celebration at the Royal B.C. Museum), and the development of attractions focusing on native culture (U'Mista Cultural Centre). The promotion of native culture has coincided with a tremendous increase in public interest regarding native art and traditions. The profile of the region's native culture has been further enhanced by the national and international reputation of a number of the region's native artists.

The region has taken some major steps in recognizing and promoting native culture as a tourism resource. However, there is an excellent opportunity for the further integration of native culture and tourism, and for the involvement of native people generally, in more generic tourism resources such as food and accommodation services.

Those native people who support the development of tourism see it as a sustainable industry which complements their desire to preserve and highlight the uniqueness of their traditional way of life. In addition, increasing public awareness of, and interest in, native culture specifically, and the educational component of holidays generally, confirms its tourism potential.

Despite this potential, it is critical that any effort to promote native cultural resources for tourism purposes must be tempered by recognition that the carrying capacity of some of these resources is limited. The concern of the region's native communities that their sacred sites be respected and not damaged must be taken seriously.

Market Profile:

Although market data may be available for individual native culture attractions, it has not been compiled on a provincial or regional basis. It is apparent, however, that visitor interest in native culture is significant. On the West Coast, for example, one high-quality native art gallery had visitation and revenue reach double the level they had projected for their first month of operation.

According to Visitors '89, four per cent of non-resident travellers to the region attended a cultural event or attraction. Applying this percentage to the total number of visitors to the region means approximately 200,000 people visited a cultural attraction (Visitors '89 does not distinguish between native and other cultural attractions). Native culture resources seem to be particularly appealing to European, Japanese and American visitors.

Strengths/Benefits:

- The development of native cultural resources will enhance the drawing power and market appeal of various areas in the region.
- The high quality of some of the land owned by the native communities enhances its development potential.
- Native culture is appealing to the international and up-scale market and could draw an increasing number of higher-paying overseas visitors.
- The development of native culture resources will generate a range of spin-off opportunities (transportation and accommodation).
- Promoting native culture will provide the region's native community with viable employment opportunities. Extending this involvement from cultural attractions to the traditional tourism service sector will provide some of the business and management skills needed to help deal with current high native unemployment.

Weaknesses/Constraints:

- Although the development potential of native culture is excellent, many native communities do not have the equity necessary to realize or maximize this potential.
- Construction on band property is not subject to zoning or building permit restrictions. This lack of control could lead to the construction of unsightly tourism developments which will negatively impact surrounding communities. Furthermore, safety and insurance factors must be considered as part of any tourism development on native property, as must the fact that the cost of servicing any development on band property will be borne by the surrounding community.
- Successful development of native culture tourism depends on the availability of resource person(s) to direct projects on a step-by-step basis.
- Effective programming and marketing, and the provision of appropriate ancillary services, are critical to the successful development of native culture tourism.

- The resolution of native and non-native conflicts (blockades, land claims) is imperative to enhancement of the profile of native culture tourism.

NOTE TO NATIVE CULTURE OPPORTUNITIES

Although the region has extensive native culture and heritage resources which might be of interest to visitors, only those opportunities specifically identified during the public input process by representatives of native bands have been incorporated into the strategy. It was the wish of the task force that this be done to ensure that they not be seen to be imposing ideas on the region's native community which may not have the support of residents of that community.

KEY OPPORTUNITY:

■ **Construct a native cultural centre and ecological museum in Bella Coola.**

Opportunity Definition:

The Bella Coola Valley has a wealth of native culture and heritage, and ecological resources, as well as a number of other significant tourism opportunities. However, the area lacks a facility which interprets these resources. The construction of a native cultural centre and ecological museum would provide a major boost to the region's tourism infrastructure and serve as a focal point for the range of tourism opportunities in the region.

It is recommended that the centre, which would have native culture as its primary focus, incorporate the following:

- a major tourism resource and reception area;

- a native cultural centre/museum/live demonstration area for the Nuxalk, Carrier, Heiltsuk and Oweekeno people;

- interpretation of the natural history of the Pacific Coast rainforest;

- interpretation of the region's primary industries — fishing and logging;

- interpretation of the Alexander Mackenzie Heritage Trail; and

- provision of tourist information services.

Market Focus:

- overseas visitors;
- outdoor adventure participants; and
- Americans.

Public-sector Roles:

- Provide planning, marketing, and management and operations assistance if requested.
- Assist in compiling interpretive material and designing displays for use in the centre — such as through the provision of technical services by the Archaeology Branch or the Royal B.C. Museum.
- Make SuperHost and other relevant tourism-oriented programs available for centre/ museum staff.
- Provide provincial tourism brochures and information for distribution through the tourist information component of the centre.
- Provide water and power services.

Private-sector Roles:

- Through co-operation between the native community and other relevant tourism interest such as the local museum, finalize preferred building design components and oversee the planning and construction process.
- In co-operation with the Archaeology Branch and other appropriate public-sector agencies, prepare the centre's storyline, interpretive information and display material.
- Work within the guidelines governing the use and display of native and other heritage resources (i.e., the Archaeology Branch).
- Manage, fund and staff the centre. Provide artisans to conduct live demonstrations, etc.
- Work with other tourism operators in the area to create tour packages incorporating the centre with other activity options in the region.
- Prepare and distribute information regarding the centre to relevant marketing outlets — i.e., Cariboo-Chilcotin Travel InfoCentres and other native attractions and museums.

Other Native Culture Tourism Opportunities:

- Incorporate a gift shop/gallery of quality native art and/or a carving or weaving demonstration studio as part of the marina development proposed for the Powell River area. If this latter development were constructed near the community of Sliammon, native residents could be responsible for operation of the other components of the marina as well.

5.10 OUTDOOR ADVENTURE TOURISM

In the study "Adventure Travel in British Columbia" outdoor or adventure travel is defined as a leisure activity that takes place in an unusual, exotic, remote or wilderness destination and tends to be associated with high levels of involvement and activity by the participants, most of it outdoors. Adventure travellers expect to experience varying degrees of risk, excitement and tranquillity and to be personally tested in some way.

Growth in "outdoor adventure" tourism has been the travel phenomena of the last few years. An increasing number of people are taking part in outdoor adventure activities which range in degree of risk, excitement and locale from hiking in Paradise Meadows to a two-week camel trek over the Sahara. A 1987 study found that adventure travel had been growing by approximately 17 per cent annually while predictions of a 15 to 20 per cent future growth rate will see industry participation double in four or five years. During the last few years there has been an increase in the profile of B.C.'s traditional outdoor activities, as well as in the availability of more exotic activities such as heli-hiking and remote river-rafting tours.

The Vancouver Island/Coast Region is in an excellent position to improve the role it currently plays in the outdoor adventure travel sector. The region's natural resources provide the basis for developing or building on a wide range of both casual and more demanding outdoor adventure opportunities. Although some of these opportunities have been discussed as part of other development opportunities (canoeing, kayaking, diving), it is important this sector be addressed separately.

Market Profile:

The number of people participating in outdoor adventure tourism is unknown. The 1988 study 'Adventure Travel in British Columbia' states that a major portion of people who participate in outdoor adventure activities are residents of the province. Special run information from Visitors '89 indicates that almost 9 per cent of non-resident visitor parties to the region (210,000 people) participated in some form of wilderness adventure activity during their visit. Partici-pation by non-residents varies significantly by origin, as follows:

	Per Cent
Alberta	3
Ontario	3
Other Canada	7
Washington	6
Oregon	6
California	12
Other West. U.S.A.	9

	Per Cent
Other U.S.A.	14
International	17

The demographics of participants varies depending on the specific activity. Overall, however, the most prevalent age group is 35 to 54 and there are somewhat more male than female participants. Singles are the most common party composition for 'hard' adventure activities, while couples are the most common for softer adventure activities. With overall participation in outdoor adventure increasing by approximately 15 per cent annually, the potential for this sector of the tourism industry is very strong.

Strengths/Benefits:

- Outdoor adventure opportunities can be developed in areas where traditional tourism activity is difficult to attract.
- Many areas in the region are highly suited to the development, or further development, of outdoor adventure opportunities. Several components of the region's outdoor adventure product can be considered world-class.
- Some outdoor adventure opportunities can be offered on a year-round or extended season basis.
- The servicing requirements of outdoor adventure travel tend to be high and thus generates a range of direct and spin-off benefits.
- Outdoor adventure travellers are willing to pay high per diems for a quality experience.
- Development of outdoor adventure resources will raise the region's profile in the international travel market.
- The Ministry of Parks is currently reviewing the provincial park system and is open to suggestions regarding the improvements of existing parks and the incorporation of other areas with naturally significant features, into the existing park system.
- Development of some outdoor adventure activities can be done with minimal capital investment.

Weaknesses/Constraints:

- The development of quality, outdoor adventure opportunities is hampered in some areas by an inadequate infrastructure and/or facilities to service the industry - i.e., poor transportation links or insufficient accommodation facilities.

- Some outdoor adventure opportunities have only a short operating season due to climate restrictions.
- It can take several years for an outdoor adventure business to develop the market profile needed to become viable.
- Industrial activity has had a negative impact on some important wilderness areas in the region.
- The area has not fully capitalized on its world-class diving opportunities.
- It is difficult for outdoor adventure operators to secure financing.
- Experienced staff are in short supply.
- Liability and safety concerns are important issues for this sector.
- Access to some key wilderness areas is difficult or expensive.
- Need to ensure the ongoing protection of areas used for outdoor adventure activities.
- Over participation in or promotion of, a particular activity could detract from the ability of operators to provide a quality experience.
- Some operators have developed quality packages based on excellent resources but lack the financial ability to adequately market their services.

KEY OPPORTUNITY:

■ **Enhance wildlife viewing and birdwatching opportunities.**

Opportunity Definition:

The Vancouver Island/Coast Region offers a range of quality wildlife viewing and birdwatching opportunities which could be more effectively capitalized on by the tourism industry. The increasing popularity of wildlife viewing, combined with the extent and quality of the resources, provides the basis for the successful development of this opportunity. Visitors to the region have the opportunity of viewing wildlife in a variety of urban and rural settings. Not only do the region's parks, recreation areas and ecological reserves provide a natural focal point for enhancing wildlife viewing activities but several well-developed wildlife viewing oppor-tunities are currently available in or near the region's towns or urban centres – i.e. whalewatching off Tofino, Ucluelet and Victoria, sea lion tours in Nanaimo Harbour and birdwatching in Parksville.

Despite these existing viewing opportunities, much more can be done to develop this tourism resource. Key opportunities could include:

- augmenting promotion of established activities such as whalewatching;
- improving access and viewing opportunities in untapped or under utilized resource areas – i.e., by establishing organized tours, constructing viewing platforms, organizing elder-hostel programs with a wildlife focus or, holding wildlife-related festivals such as the Parksville Brant Festival or the West Coast Whale Festival;
- providing relevant ancillary services and facilities such as lodges or guiding services; and
- enhancing interpretive services.

The most significant wildlife resources in the region appear to be:

- killer whales;
- grey whales;
- shorebirds and raptors (herons and eagles);
- sea lions;
- underwater marine animals;
- bears (coast area); and
- mountain goats (coast area).

Market Focus:

The market appeal of the region's wildlife viewing opportunities varies somewhat from one area of the region to another. For example it is likely that visitors participating in wildlife viewing in the Central Coast area are likely to be more outdoor/adventure oriented then the touring visitors likely to go whalewatching at Robson Bight. Nevertheless, the key segments of the region's wildlife viewing include:

- residents with visiting friends and relatives;
- specialists (visitors with interest in specific species);
- families with school age children;
- casual outdoor adventure participants; and
- committed outdoor adventure participants.

Public-sector Roles:

- Assess the need to establish licensing requirements for all wildlife tour operators.

Review the establishment of licensing requirements for whalewatching operators in consultation with this industry.

- Ensure sensitive and significant habitat areas are designated for protection.
- Work with relevant organizations to develop trails and wildlife interpretive services in the park system where appropriate.
- Emphasize wildlife viewing and birdwatching opportunities in provincial marketing.
- Provide or improve relevant directional signage.
- Provide technical and feasibility assistance and available market data to communities and individuals wishing to capitalize on wildlife viewing opportunities.
- Complete a regional inventory of wildlife viewing opportunities for use by potential operators which describes resource quality, access issues, current level of viewing activity, development constraints, etc.

Private-sector Roles:

- Develop, market and operate wildlife/birdwatching tours.
- Organize, market and run wildlife-related festivals or special events.
- Operate tours in an environmentally sensitive manner – until licensing requirements are in place, commit to self-policing to ensure the ongoing protection of wildlife resources.
- Assist in funding and constructing wildlife viewing facilities and services.
- Develop package tours and elderhostel programs incorporating a wildlife viewing focus.
- Provide the ancillary facilities needed to service the wildlife viewing market.

Key Opportunities:

- **Develop kayaking and canoeing opportunities.**

Opportunity Definition:

The natural features of the Vancouver Island/Coast Region provide a range of quality kayaking and canoeing opportunities for visitors. These natural resources combine with the growing popularity of outdoor adventure type activities generally, and marine based activities specifically, to create a market opportunity with significant potential. Capitalizing on this potential will not require much effort as infrastructure requirements are limited and tour services and activity opportunities already exist. The potential o these activities rests in maximizing awareness of and participation in existing opportunitieswhile expanding such participation opportunities where appropriate.

Although canoeing and kayaking occur througut the region, the most popular destination areas include the Broken Islands in Barkleound, Clayoquot Sound and the Johnstone Strait near Telegraph Cove, while less-well-kno but still popular areas include the Gulf Islands, Powell Lake, Nootka Sound and Kyuquot Sot

A number of steps can be taken to enhance the ism potential of this opportunity. These include, but are not limited to:

- offering guided or self guided canoe/kayak toursre none currently exist) in areas which offer beautiful scenery, beaches, protectedand areas suitable for camping;
- enhancing awareness of existing canoe or kaytes (Powell Lake) through the publication of information regarding location, aoility, length, skill requirements, route features and, available ancillary services;
- establishing a kayak-launching site and seasonal acilities near Telegraph Cove;
- establishing seasonal canoe and/or kayak rentaluired in other appropriate areas – i.e., Gulf Islands, Powell River;
- enhancing promotion of existing tour services ing and kayaking opportunities – i.e., kayaking instructional courses at Strathcoodge;
- promoting the development of combination p- i.e., kayaking and canoeing, and wild-life viewing.

Market Focus:

- dedicated outdoor adventure travellers;
- casual outdoor adventure travellers;
- couples 30 to 50, well-educated, professi
- Europeans; and
- young males (20 to 30), well-educated, f

Public-sector Roles:

- Ensure adequate steps are taken to protect the area's scenic coastal resources and canoeing rivers.
- Maintain and enhance the region's marine park network.
- Support development of canoeing and kayaking guide training and licensing programs – i.e., through Strathcona Park Lodge.
- Provide market data and marketing advice to operators.
- Work with these sectors to identify locations suitable for establishing guided or self guided tours and seasonal rental services.
- Ensure the guiding and rental components of the canoeing and kayaking sectors are eligible for government and co-op student grant programs.
- Incorporate reference to the specific canoeing and kayaking opportunities and services avail-able in the region in the B.C. Adventure Travel Guide.

Private-sector Roles:

- Maintain an updated guide listing the canoeing and kayaking opportunities, guiding services and facilities available in the region.
- Identify, develop, promote and operate guided kayaking and canoeing packages and destination opportunities. Packages could combine tour services with accommodation and ground transportation, or combine kayaking with other activities such as wildlife viewing.
- Work with the public sector to establish a guide training and licensing program.
- Once a training program is established, encourage all guides to become licensed and to keep their training current.
- Ensure that all guiding or related canoeing and kayaking services and activities are conducted in an environmentally sensitive manner.
- Enhance promotion of existing opportunities – i.e., Powell Lake Canoe Route.
- Keep track of client market data for use in the development of an accurate client market profile which will allow marketing activity to be more effectively targeted.

Other Outdoor Adventure Tourism Priorities:

- Develop the proposed Vancouver Island 'Backbone' Trail, a 640 kilometre trail running from Cape Sutil to Victoria.
- Support the development of outdoor adventure opportunities and facilities for the disabled in the Powell River area.
- Upgrade the Cape Scott Trail and place a park manager on-site during the summer.
- Develop Raft Cove in Mt. Waddington, including the access road.
- Develop an inter-island hiking and walking trail system connected by passenger boat service.
- Promote the hiking potential of the Alexander Mackenzie Heritage Trail. Continue trail upgrading and provision of interpretation and hiking services (i.e., huts).
- Construct high-quality 'wilderness' lodges. Such lodges would be particularly appropriate in the Central Coast, Mt. Waddington and Powell River. The latter should be handicapped accessible to complement Powell River's 'model community' approach to tourism development.
- Encourage the perimeter development of Strathcona Park. Development priority should focus on businesses which promote and complement the environmental and outdoor/adventure orientation of the park – i.e., elderhostel facilities conducive to hosting park-oriented programs; guiding and transportation services.
- Develop and promote windsurfing and hang-gliding opportunities – i.e., Nitinat Lake
- Develop the range of caving opportunities in the Gold River and Qualicum areas and improve related guiding services.
- Build on the region's scuba-diving potential, through the creation of artificial reefs, or by developing facilities to more effectively service divers to Discovery Passage.
- Hold 'outdoor schools' – i.e., in the Central Coast.
- Expand or improve the region's mountain biking trail system. Consider using resources such as abandoned rail lines for the development of mountain bike paths.
- Encourage development of biking trails as part of highway and road improvements throughout the region.

5.11 SKIING

Skiing tourism refers to the development and promotion of the region's developed alpine and nordic ski facilities and opportunities to draw visitors. It also refers to the range of ancillary services supporting the ski industry, such as equipment sales and rentals, transportation, and ski packages.

The Vancouver Island/Coast Region has four developed alpine and/or nordic ski areas. All four of these ski areas (Mt. Arrowsmith, Forbidden, Mt. Washington and Mt. Cain) are located on Vancouver Island. Of the four mountains, Mt. Washington has the most extensive facilities including four chairlifts, a five-month season, more snow than any other B.C. ski area, and some of the best nordic trails in the Pacific Northwest. Although the other areas are adequate for resident skiing, they lack the quality skiing opportunities which would make them competitive with Mt. Washington.

Available data indicates that while alpine skiing has a higher profile, a significant number of people participate in nordic skiing. Of nordic skiers, 35 per cent select a ski area because it is convenient or accessible while 21 per cent select a site because it is the best. Ninety-five percent of all nordic skiers on the Island are from B.C. with the Comox Valley and Victoria making up the majority. Of alpine skiers, 30 per cent identify convenience or accessibility and 20 per cent identify best site as the reason for selecting their ski area. Over 90 per cent of alpine skiers on Vancouver Island are from B.C., again with the majority from the Comox Valley and Victoria.

Approximately 10 per cent of all B.C. alpine skiing occurs on the Island (and likely a lower percentage of nordic skiing). General observations indicate that the number of people skiing is increasing. Although skiing is limited to the areas discussed, it can play a significant role in expanding off-season travel to and on the Island, and in building on the outdoor adventure profile of the region.

Market Profile:

The region's ski facilities recorded between 250,000 and 300,000 skier visits in 1989 (down significantly from 1988 due to weather conditions). The great majority of skiers (over 80 per cent) are residents of Vancouver Island. Another one to two per cent are from the U.S. or Overseas, while the remainder come from the mainland.

Of downhill skiers, approximately two-thirds are married, the proportion of females to males is roughly equal, over 60 per cent are between the ages of 30 to 54, close to 50 per cent come from a household which earns $50,000 or more annually, and more than 60 per cent have at least some university or college training. For cross-country skiers, 33 per cent are between the ages of 35 and 54, while 26 per cent are between 20 and 34 and 26 per cent are over 55. There are somewhat more males than females who cross-country ski (54 per cent versus 46 per cent) while party composition is fairly evenly divided between families, couples, singles and groups. Despite a poor 1989 season, long-term participation information reflects strong overall growth. It is expected that ongoing growth potential for the industry is strong although the majority of skier visits will continue to be generated by residents of the region.

Strengths/Benefits:

- Improving the facilities and profile of regional skiing opportunities will encourage resident skiers to spend more time and money skiing in the region and will gradually improve penetration of the non-resident market.
- Weather and snow quality are generally dependable and provide good skiing conditions.
- Mt. Washington is strategically located by Strathcona Provincial Park.
- It is much cheaper to ski on Vancouver Island than at Whistler.
- Nordic skiing appeals to people of all ages and skill levels.
- Mt. Washington, and the other ski areas on the Island, offer beautiful scenery and dramatic natural features.
- Island ski facilities can emphasize that they provide skiers the opportunity to ski somewhere different.

Weaknesses/Constraints:

- Access problems (getting to the Island and driving distance) will continue to limit market potential.
- Skiing is highly weather-dependent.
- Development or expansion of access roads (paving) and ski facilities is very expensive.
- The ability to participate in nordic skiing wherever there is snow and suitable terrain will limit potential visitation by residents to commercial nordic ski areas.
- It will become increasingly difficult to compete against Whistler. Once the Whistler highway is improved, it is likely Island skiers will frequent Whistler more often.

KEY OPPORTUNITY:

- **Encourage the further development of Mt. Washington to include on-hill accommodation, four-season activities and a paved road.**

Opportunity Definition:

Since Mt. Washington opened for business in 1979-80, it has enjoyed an increasing number of visits. Initially designed to cater almost exclusively to skiers, recent years have seen more people accessing the mountain to participate in hiking. Although Mt. Washington has a range of quality facilities including several lifts, nordic trails, a nordic and alpine day lodge, an RV park, and a retail area, significant investment and expansion is required if Mt. Washington is to remain competitive with the province's other destination ski areas.

Preliminary studies indicate that Mt. Washington has the potential to become one of the province's top resorts. Management is interested in seeing the resort expand in order to enhance both its viability and that of the Comox Valley. It is further committed to maintaining the resort's family orientation. To address these issues, a number of improvements have been identified. These include provision of an all-weather paved access road, construction of on-hill visitor accommodation, and promotion of four-season activities.

A paved road is required from the base of the mountain to both the Nordic and Alpine skier parking lots. Additional condominium development is currently being considered for Mt. Washington. The construction of a hotel with limited convention and meeting facilities would likely have significant market draw and would complement the goal of operating year-round.

Mt. Washington has excellent four-season potential, and benefits from its location in the Comox Valley near the ocean and its proximity to Strathcona Park. It is recommended that operation of the lifts during summer continue, and that ongoing effort be made to improve marketing of summer activities. Summer potential can be improved by expanding hiking trails or improving existing trails, providing mountain biking opportunities and hosting more special events. Special events could include mountaineering weekends, mountain bike races, elderhostel study sessions, etc.

Market Focus:

The ultimate market potential of Mt. Washington is extensive, given the range of activity options available. From a skier perspective, however, it is likely that its major market will continue to be residents of Vancouver Island with some increased penetration of the Lower Mainland and Washington if transportation links are improved and the price differential between Washington and Whistler continues to widen. In addition to improving the traditional Vancouver Island resident market, Mt. Washington would also appeal to several other segments if the proposed improvements were undertaken. These include:

- destination skiers;
- families;
- small meeting groups; and
- elderhostel.

Public-sector Roles:

- Fund the paving of the access road to Mt. Washington.
- Work with management to identify service requirements of the proposed expansion (telephone, sewer and water) and review cost-sharing options.
- Promote investment opportunities to potential investors.
- Incorporate reference to the summer and winter potential of Mt. Washington in regional and provincial marketing activities.
- Continue to improve transportation links to, and on, Vancouver Island.
- Continue the Partners in Tourism Program.
- Make all relevant market information available to management.

Private-sector Roles:

- Work with the public sector to identify service requirements of the proposed expansion and review cost-sharing options.
- Plan, finance and construct expanded or improved summer and winter facilities.
- Augment programming services and plan and host additional special events.
- Conduct ongoing visitor surveys and market assessments to remain apprised of trends and visitor needs.
- Improve marketing activity to identified target markets once expansion has been completed.
- Maintain competitive pricing to reduce impact of the Okanagan ski areas which have become much more accessible to the Lower Mainland and Victoria residents via the Coquihalla Connector.

Other Skiing Development Priorities:

- Develop ancillary services in communities surrounding ski facilities.
- Encourage the long-term development of smaller regional mountains. For example:
  - build a lodge at Mt. Cain;
  - expand summer and winter services and facilities; and
  - review the development potential of Green and Coronation mountains.

5.12 SPORTS TOURISM

Sports tourism results when communities use existing sports facilities (or develop new ones) such as pools, arenas and playing fields to hold sports tournaments or competitions designed to draw participants and spectators from outside the region. The concept of using sporting events as a catalyst for generating tourism activity is increasingly being recognized as a viable tourism development opportunity in the Vancouver Island/Coast Region.

Many of the region's communities have been hosting sporting events on a casual, billeting basis for years. More recently, however, various sporting interests have been successful in drawing events to the region (especially Victoria) which are of national and international significance. These include the Canadian Curling Championships, Skate Canada, and the International Softball Championships. The economic activity generated by such events is significant. An awareness of the potential of this component of tourism has led communities such as Port Alberni to initiate their own community-oriented sports tourism strategy.

Generally, participation in organized, league sports appears to be increasing. The Vancouver Island/Coast Region has the facilities and weather to promote increased, organized sporting events. Recently the region benefited from the B.C. Winter Games which were held in the Cowichan Valley. On the national and international scale, the region, and especially Victoria, stands to benefit substantially from the increased sports profile generated by the 1994 Commonwealth Games.

Market Profile:

There is only limited information available regarding the size or characteristics of the sports tourism market. Because of the nature of this sector of the tourism industry, the number of tourists visiting the region in connection with sports tourism will vary depending on the type and number of events taking place. It is estimated that the majority of participants in regional sporting events are B.C. residents. Nevertheless, Visitors '89 indicates that close to 39,000 non residents participated in a sporting event or activity in the region in 1989.

Strengths/Benefits:

- Sports events occur year-round and, thus, can be used to generate off-season tourism activity.
- High-profile sports events generate significant community participation, resident spending and spin-off economic activity.
- Events involving national and/or international competition raise the tourism profile of the region generally as a result of media coverage.

- Trends indicate an ongoing increase in the number of people of all ages participating in sporting activities.
- Some sporting activities such as training clinics will draw extended-stay visitors.

Weaknesses/Constraints:

- Sports events are usually not more than a few days in length, thus potential direct benefits are generally one-time only.
- It will be difficult for other areas of the region to compete against Victoria for the opportunity to host major sports events.
- Most major sports tournaments operate on a 'rotational' basis and visit communities only once or every few years.
- Promotion costs for bidding on, or drawing, a major sporting event to the region can be expensive.
- Successful sporting events generally require extensive, committed volunteer involvement.
- Sports facilities require ongoing capitalization and are generally not profitable of themselves.
- Most major events determine tournament or competition locations two or three years before the actual event. Thus, adequate facilities must often be in place before a site is selected, rather than be built on the knowledge the event will be coming.
- Trying to find a cost-sharing formula which is agreeable to all involved bodies can be difficult.

KEY OPPORTUNITY:

- ■ **Increase the number of high profile sports events hosted in the region — i.e., bike races, summer and winter games.**

Opportunity Definition:

As earlier noted, participation rates in almost all levels of organized and unorganized sporting activities are increasing. Although the Vancouver Island/Coast Region already hosts, or has hosted, a broad range of very successful, high-profile sports events, more could be held. As with other opportunities, it is critical that a community assess its resources from a sports tourism perspective and review the market potential of the sports events it could reasonably host, before initiating the planning process.

Catering to the sports tourism market is one way of encouraging shoulder and off-season tourism activity. Although public-sector and private-sector roles are discussed below, the ultimate potential of this opportunity is limited by the degree to which individuals or sports organizations are willing to oversee the planning and hosting of major sports events. Such events are probably most appropriate for mid- to larger-sized communities which have a strong sports infrastructure. While events of varying sizes could be held for a wide range of sporting activities, current trends indicate that those with the most potential include golf, skiing, mountain biking and volleyball. Certain communities, however, have the ability to cater to distinct segments of the sports market and should continue to build on these strengths. These include for example, windsurfing on Nitinat Lake and disabled sports in Powell River.

Market Focus:

- B.C. residents;
- Washington residents;
- 20 to 40 year age group; and
- fans of specific sports.

Public-sector Roles:

- Work with local groups/communities to assess available infrastructure and identify events with strong market potential.
- For significant, regional events, provide funding, technical and marketing assistance on a cost-shared basis – i.e., Summer or Winter Games
- Publish a visitor-oriented calender of events (community, regional and provincial) highlighting sporting events. This can be incorporated into existing publications.
- Provide appropriate on-site support services such as security and medical assistance.

Private-sector Roles:

- Promote a community's potential to host specific events.
- Organize, fund and market sports events.
- Work with the public sector to finance and construct additional sports facilities as required.

- Co-operate with other sports organizations/communities throughout the region, to co-ordinate event timing.

Other Sports Tourism Priorities:

- Improve key sporting facilities in Victoria (some of this upgrading and development will occur as part of the preparation for the Commonwealth Games) including aquatic facilities and a larger spectator-oriented arena in order to increase the region's ability to draw future events.

- Host sporting events for the disabled in Powell River.

- Smaller communities in the region should concentrate on drawing mid-sized and even small events scaled to their capability to accommodate competitors.

- Develop or promote bike circle tour and mountain biking opportunities throughout the region.

- Host tournaments for those less traditional but increasingly popular sports the region is becoming known for – i.e., windsurfing, wheelchair sports.

5.13 TOUR PACKAGING

Tour packaging opportunities refer to the development of travel packages which combine any variation of tourism services such as transportation, accommodation, meals and activity options and can be purchased by visitors. Tours can range from one day to several weeks. Those components identified as part of a travel package are generally fully organized by the travel company. Tour packages frequently focus on a specific activity such as golf.

The region's existing and potential tourism resources and opportunities can be significantly enhanced by the creation of appropriate programming and packaging activities. As the trend section indicates, tourists, especially seniors, are increasingly opting for fully or partially organized travel packages which combine the accommodation, transportation and activity components of a vacation. In addition, more people are viewing holidays as a participatory, educational experience rather than a passive activity. As a result, quality, relevant programming can play a major role in drawing visitors to a particular area or attraction, keeping them there longer or increasing their level of satisfaction.

Although the Ministry of Development, Trade and Tourism has been promoting the creation of packaging opportunities for the province, much more can be done to take advantage of the tourism potential of packaging and programming, and to augment the destination focus of the region.

Market Profile:

In 1989, approximately seven per cent (164,000) of non-resident visitors to the region were on a package tour. There is a higher proportion of females to males on package tours. In addition, the greatest number of tour package participants are senior adults. The popularity of package tours will continue to grow, partly as a result of the aging of the population and partly because of people's increasingly hectic lifestyle and resulting preference for an organized vacation.

At present, the origin of non-resident visitors on bus tours is as follows:

	Per Cent
Alberta	3
Ontario	1
Other Canada	5
Washington	4
Oregon	6
California	9
Other West U.S.A.	4
Other U.S.A.	17
International	12

Strengths/Benefits:

- The region offers all the components necessary for the creation of quality travel packages.
- Will greatly enhance the overall destination appeal of the region.
- Will improve penetration of that segment of the market which prefers to participate in package tours.
- Will encourage greater integration and co-operation among all segments of the industry – i.e., accommodation, attractions, transportation.
- Will spread tourism benefits throughout the region.
- Will provide an effective way of drawing more bus tours (a form of travel which is increasing significantly).
- Will lead to increased marketing and advertising activity for the region generally, as a result of the promotions which would be generated by more packaging and programming.
- Will increase wholesaler awareness of, and involvement in, the region's tourism industry.
- May generate increased shoulder and off-season tourism activity.

Weaknesses/Constraints:

- A lack of co-operation among components of the industry in some areas of the region may inhibit package development.
- A facilitator may be required to help put packages together and market them to wholesalers and travel agents.
- Effectively marketing packaging and programming opportunities can be costly.

TOUR PACKAGING OPPORTUNITIES

Although improved tour packaging opportunities apply to tourism in the region generally, the following specific suggestions are intended illustrate the range of tour packaging opportunities available. Packaging is a key way to enhance tourism activity in the region. The following package suggestions are grouped by theme. These are intended as examples of what can be done within a theme. Packages can, of course, combine opportunities from various themes. A key tour packaging opportunity for the region is the development of "hub and spoke" tours which would see urbans centres serving as the focus for a variety of day trips.

ECO/ENVIRONMENTAL:

- Environmental study or circle tours.
- Ecotourism opportunities can be promoted on their own as a tour theme or in combination with industrial or outdoor adventure tourism. For example, a tour of the Carmanah Valley can be combined with a mill tour.
- Develop and market tour opportunities to secondary and post-secondary institutions, outdoor clubs, environmental organizations and elderhostel.

INDUSTRIAL:

- Combine the opportunity to participate in a mill or forestry tour with other activity options. A two- or three-day fishing charter in Port McNeill or Port Alberni could include an afternoon forestry tour. This would appeal to people who may like to do something other than fish and would also give visitors the opportunity to learn about the forestry activity they see from the water.
- Include industrial tourism resources as part of circle tour itineraries.
- Encourage school and other groups to combine visits to museums such as the Forest Museum with a visit to a modern mill.
- Make industrial tour information available at museums and other relevant attractions.

HERITAGE:

- Combination bus and/or walking and heritage building tours in appropriate areas – i.e., Victoria, Nanaimo, and Powell River.

- Combination heritage and modern industrial tours such as a trip on the E and N to Ladysmith and a tour of the Railway Museum, or a visit to the Forest Museum and a tour of modern forestry operations in the Cowichan Valley.

- Host special events or activities that complement an area's heritage resources. These could include a re-enactment of significant events such as the arrival of Alexander Mackenzie in the Bella Coola area or the discovery of gold at a mine site.

- Develop heritage theme tours, including excursion or multi-day visits to a combination of heritage sites representing various aspects of the region's history, i.e., Craigflower Schoolhouse and Manor, the Ecomuseum and/or Forest Museum, the Railway Museum, downtown Ladysmith and Newcastle Island.

- Combine activities and events involving heritage resources with activities or events involving native culture, where applicable. For example, Fort Rupert's history is closely connected to both the Hudson's Bay Company and the neighbouring Kwaguilth native community.

- Develop elderhostel heritage tours and study sessions.

MARINE:

- Offer luxury excursion and multi-day boat tours.

- Develop combination land- marine-based activity packages. For example, drive to a marina, stay over at the marina hotel, take a two-day boat trip, spend another night at the marina hotel and take a walking tour or play golf at a nearby course. Many combinations are possible.

- More extensive boating or scuba-diving opportunities could be combined with air, ground transportation and accommodation to provide full-service packages for promotion through wholesalers, travel agents and trade shows.

- Make marinas the focus of relevant special events and marine based activities – i.e., kayak or canoe races, fishing derbies.

- Develop and promote marine circle tours – i.e., Gibsons, Powell River, Comox.

- Improve or provide interpretive/education services on existing boat or marine tours.

- Profile the region's more exotic marine based activity options – i.e., parasailing, wind-surfing.

- Provide additional kayaking, sailing or powerboat excursion or multi-day tours in the Powell River, Central Coast, Alberni-Clayoquot or Gulf Islands areas.

NATIVE CULTURE:

- Offer more excursion opportunities to native sites culminating with a salmon barbeque and/or native entertainment. Possible locations include the Cowichan Valley, Quadra Island, Alert Bay, Ahousat and Sliammon.

- Create combination native culture and heritage tours.

- Combine whalewatching tours to Robson Bight with a visit to Alert Bay.

- Market day-trips and circle tours to see native culture in the Cowichan Valley during large-scale native events held in Victoria.

- Include information on the native approach to the environment as part of ecotourism tours.

- Develop packages focusing on native culture (circle tours) using major events such as the "First Nation's Festival" as the catalyst for attracting visitors.

- Promote the region's key native culture attractions (native heritage centre or U'Mista Cultural Centre) at Vancouver and Victoria galleries which sell or feature the work of well-known native artists.

OUTDOOR ADVENTURE:

- Combine urban and outdoor adventure packages.

- Increase the number and/or profile of two- to three-day full-service outdoor adventure packages offering single- and multi-activity options (a day fishing, a day canoeing and a day heli-hiking).

- Develop wheelchair-oriented tours in Powell River.

- Develop outdoor adventure excursion opportunities and promote them at destination-type resorts or accommodation facilities. A Campbell River or Victoria hotel, for example, could offer the opportunity to go heli-hiking in Strathcona Park.

- Enhance guiding and/or information and interpretive services relating to outdoor adventure opportunities in the region's provincial parks.

- Package full-service outdoor adventure packages for seniors which emphasize safety, quality of opportunity or experience, and extensive interpretation.
- Expand integration of outdoor adventure activities with traditional travel services.

FISHING:

- Develop sports fishing packages catering to men and women and to families.
- Charter companies in communities with a strong salt-water fishing focus should consider providing onshore recreation or activity options for wives and families of anglers.
- Offer charter packages which combine sports fishing with other marine activities such as wildlife observation, photography, scuba-diving, as well as with shore-based activities.
- Increase visitor awareness of, and participation in, fishing derbies.
- Where available, promote the opportunity to "catch and can" fish.
- Promote fishing through one- or two-day pre- or post-conference package options.
- Increase availability of freshwater fishing tour and guiding services and packages.

SKIING:

- Develop high-quality touring and nordic ski packages combining transportation, accommodation, food, and ski opportunities.
- Promote availability of powder skiing at Mt. Washington and Mt. Cain.
- Promote and improve regularly scheduled local commuter service to ski areas.
- Exploit the proximity of Mt. Washington and Forbidden to Strathcona Provincial Park.
- Promote skiing opportunities as part of other winter-oriented community events.
- Market skiing as a pre- or post-conference opportunity.

SPORTS EVENTS:

- Develop packages which combine the opportunity to participate in, or attend, a sports event with a more traditional tourism activity – i.e., attend the Commonwealth Games and take a two-day post-event trip to the Alberni Valley and the West Coast.

- Market, and provide tours or transportation to, other tourism facilities in a community during an event – i.e., fishing off Campbell River during a softball tournament.

GOLF:

- Develop five- to 14-day golf tour opportunities, either destination or circle tours. These full-service tours should include transportation, accommodation and green fees.
- Offer golf clinics at some of the region's quality courses.
- Sponsor invitational and more-casual golf tournaments.
- Develop combination tours which focus on golf plus one or more other activities. Developing tours which promote the ability to ski, golf and fish all in the day, for example, would be an effective way of generating market interest.

ARTS AND CRAFTS:

- Develop arts and crafts workshops catering to visitors. This could be done on a formal, extended basis through the Pacific Rim Artisan's Village, or on a less-formal basis such as one-day water colour clinics on one of the Gulf Islands.
- Where appropriate, encourage all specialized tours to incorporate an arts and crafts component – i.e., tour buses taking golfers to the Parksville-Qualicum area could stop in Coombs to buy arts and crafts souvenirs.

EDUCATION:

- Develop elderhostel circle tours which combine educational and experiential opportunities in the region.
- Capitalize on the region's natural resources to offer 'outdoor schools' which can feature formal and informal training in subjects such as outdoor survival.
- Full-service tours which cater to adults and focus on educational opportunities, study sessions, etc., can be developed to focus on a wide range of subject areas. Some of the more popular subjects for such tours would be history, natural history, the environment and anthropology.

URBAN TOURISM:

- Expand the number and variety of heritage sites and activities to capitalize on the region's quality heritage resources and the broad market appeal of heritage tourism.

- Expand the urban guided tour market in the region's smaller urban centres.
- Increase the range of specialty tours (historic, garden, wildlife, etc.) to cater to the increasingly segmented market of special interests.
- Increase the focus on education as a major component of tour itineraries
- Utilize the E and N Railway to link tours between the region's urban centres.

5.14 URBAN TOURISM [3]

Urban or city tourism is a major element of the travel industry throughout the world. Over the past century, cities such as San Francisco, New York, London and Paris have lured visitors to their cities to "take in the sites." Furthermore, many countries use the appeal of their cities as a major component of their marketing strategy to encourage tourism.

In British Columbia, recent visitor studies indicate that four out of 10 visitors travel to an urban destination only (Victoria and Vancouver). An additional 35 per cent visit an urban destination as part of their trip. This indicates that over three-quarters of the tourists that visit the province spend at least part of their trip taking part in "urban tourism".

The Vancouver Island/Coast Region has its own urban experiences, available not only in Victoria, but in the smaller cities such as Duncan, Nanaimo, Port Alberni, Courtenay and Campbell River. The attraction and appeal of the urban experience in these centres is sometimes a specific attraction, event or activity. More often, however, it is the character of the city and the mix of amenities that provides the draw and the tourist experience. A typical urban visitor may shop, visit museums, dine in a variety of restaurants, enjoy different types of entertainment and recreation, or just stroll around.

Market Profile:

Greater Victoria hosted approximately 3.9 million visitors in 1989, about 12 per cent of the provincial total. B.C. residents make up 50 per cent of the total visitors, followed by Americans (31 per cent), other Canadians (13 per cent), and offshore (seven per cent). Direct expenditures by visitors exceed $600 million annually.

Trip characteristics vary considerably for residents and non-residents. The main trip purposes for residents are visiting friends and relatives (43 per cent) and touring (11 per cent) while for non-residents the top categories are touring (44 per cent) and visiting friends and relatives (23 per cent). The average party size is 2.5 persons. Age distribution is typically adults in the 25 to 45 age group (40 per cent) or adults over 55 (30 per cent).

Summer is the most popular season to visit Victoria (38 per cent) followed by spring (27 per cent) and autumn (24 per cent). In terms of accommodation, motels (30 per cent), friends and relatives (27 per cent) and hotels (25 per cent) are the most common for non-residents. For residents, friends and relatives provide accommodation for nearly three-quarters of visitors.

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[3] Excerpts from Urban Tourism in British Columbia, Ministry of Tourism, January 1991

Visitors to Victoria participate in a variety of activities. The most popular are sightseeing (64 per cent) and shopping (48 per cent). Attractions frequently attended include museums and historic sites (34 per cent), park and gardens (38 per cent) and beaches (23 per cent).

Strengths/Benefits

- Urban tourism is not as weather-dependent as many other forms of tourism.

- There is a wide variety of accommodation types in the region's cities, ranging from unique bed-and-breakfast homes to full-service hotels.

- Victoria is a world-class city with a well-known reputation as a clean, safe and attractive city. The city's other major appeals are the number of heritage buildings, the British ambience and the mild climate.

- Victoria is the major gateway to the Vancouver Island/Coast Region, with air and ferry ports of entry for both domestic and international carriers.

- Victoria has two attractions of international calibre – the Royal British Columbia Museum and Butchart Gardens. It also possesses one of the most attractive small harbours in North America.

Weaknesses/Constraints

- There is a major psychological barrier between Victoria and "up Island". This is partly the result of the difference in the tourism product between Victoria and other centres in the region and the "physical" barrier created by topography.

- There is a perceived shortage of accommodation for some components of the travel market, particularly organized tours and visitors looking for moderately priced accommodation.

- Victoria is perceived as a relatively expensive destination for some forms of accommodation, meals and gifts.

- The urban tourist experiences (sports, arts, entertainment, and shopping) on Vancouver Island, including Victoria, are of a different calibre than the neighbouring competitive cities of Vancouver and Seattle.

- Ferry access can be very congested during the peak summer season. There is also a limited number of major aircraft arrivals through the Victoria International Airport.

KEY OPPORTUNITY:

■ **Develop new attractions that reflect the heritage, marine location and/or scenic appeal of Victoria.**

Opportunity Definition:

Victoria has two major attractions – the Royal British Columbia Museum and Butchart Gardens. The city possesses several small, high-quality heritage attractions such as Craigdarroch Castle, Point Ellice House, Helmcken House and Craigflower Farm. Victoria also has several commercial attractions, including Sealand, Undersea Gardens, Miniature World, the Wax Museum and Fable Cottage. There has not been a new attraction developed in Victoria for approximately 20 years.

Victoria is due for a new, high-calibre attraction that would have broad appeal to the city's traditional markets as well as having the potential to draw new visitors. The attraction should be based on Victoria's resources and, ideally, be unique to Victoria. This may involve a nautical, heritage, and/or gardens theme or some other focus that is "island-oriented".

Market Focus:

The markets will depend on the actual attraction pursued, but the key market focus should be:

- family-oriented, but with a focus on children;
- repeat visitors;
- B.C. residents; and
- Pacific Northwest residents.

Public-sector Roles:

- Assist with market research and comparable facility analysis to determine the most suitable and viable attraction(s).
- Facilitate site location research.
- Facilitate the matching of projects with funding sources.

Private-sector Roles:

- Work with the public sector to identify the market potential and financial viability of appropriate attractions.

- Locate and acquire a suitable site.
- Plan, finance, develop and operate the attraction.

Other Urban Tourism Opportunities:

- Plan and organize other cultural, entertainment or sports events to be staged in the spring or fall to broaden the shoulder seasons.
- Develop other entertainment facilities.
- Increase the convention, conference and incentive travel activity, particularly in the non-peak seasons.

5.15 SUMMARY

The quality of the region's physical resources and the variety of markets has produced a diverse range of tourism development opportunities. These range from small-scale outdoor adventure developments to large-scale resorts.

As an aid in interpreting this analysis, the results have been charted in Exhibit 5-1. This matrix lists the 14 development themes against the geographic areas within the region. The geographic regions are similar to the regional district boundaries, but some adjustments have been made to more accurately reflect geographic boundaries.

The chart depicts tourism development opportunities on a three-point scale as follows:

3 - Excellent prospect for development ... Top quality resource exists ... Markets exist and can be developed further ... Timing is immediate.

2 - Good prospect for development ... Resource is of good or average quality Market potential is reasonable ... Timing is one to three years.

1 - Fair prospect for development ... Resource is significant ... Markets exist or could be developed ... Timing is longer-term.

N/A - Not applicable

The evaluation is based on the tourism development strategy. That is, each tourism development theme is evaluated relative to the opportunity for successfully developing the theme within each geographic zone. Reading the table horizontally shows the relative significance of each theme within each geographic region. Reading the chart vertically shows the relative significance of each theme within each geographic zone.

EXHIBIT 5-1

DEVELOPMENT POTENTIAL
TOURISM ZONES/AREA

	VIC.	SAAN. PEN.	SOOKE/ W.COM.	COWICH. VALLEY	NAN/ LADY-SMITH	ALB/ CLAY.	PARK/ QUAL.	COMOX VALLEY	CAMP. RV/ GOLD RV/ TAHSIS	POWELL RIVER	NORTH ISLAND	CENTRAL COAST	GULF ISLANDS
Eco/Environmental Tourism	1	2	2	3	3	3	3	3	3	3	3	3	3
Industrial Tourism	-	1	2	3	3	3	1	2	3	3	3	3	-
Heritage Tourism	3	1	1	3	3	3	2	2	1	2	2	2	1
Marine/Waterfront Development	3	3	2	2	3	3	2	2	3	2	2	2	3
Native Culture Tourism	2	2	2	3	2	2	1	2	2	1	2	2	1
Outdoor Adventure Tourism	1	1	2	2	2	3	2	2	3	2	3	3	2
Fishing	2	2	3	3	3	3	3	3	3	2	3	3	2
Skiing	-	-	-	2	2	2	-	3	2	-	1	1	-
Sports Tourism	3	1	1	2	2	2	2	2	2	2	1	-	-
Golf	2	3	2	2	2	1	3	3	2	1	1	-	-
Arts, Crafts and Music	3	3	2	2	2	2	3	3	1	2	1	1	3
Education Tourism	2	1	1	2	2	2	2	2	1	2	2	2	3
Tour Packaging	3	1	1	2	2	2	2	2	2	1	2	2	3
Urban Tourism	3	-	-	2	2	1	1	2	2	2	1	-	-

KEY
3 Excellent
2 Good
1 Fair
Not Applicable

6.0 IMPLEMENTATION PROCESS RECOMMENDATIONS

Strategy documents are generally intended to "point the direction," based on a process of review, analysis and consensus-building. The preparation of this strategy document marks the completion of one of the key steps in the development of the region's tourism industry. The measurement of success of this development strategy will be the degree to which progress occurs as a result of the strategy.

The next step in seeing results is to put a structure in place to implement the recommendations. This is crucial since the volume of material in the strategy is considerable and its recommendations affect many different organizations and agencies. Furthermore, unless a single or overseeing agency is given the role of co-ordinating implementation, progress will likely be slow and haphazard.

To maximize the success of this strategy and to encourage implementation of the report's recommendations, the Vancouver Island/Coast Tourism Task Force recommends that:

- **a sub-committee of the Task Force be struck to act as steering committee to guide implementation;**
- **representation from the major tourism or development association, appropriate ministries, and special interest groups be encouraged;**
- **a co-ordinator be retained to manage implementation of the strategy;**
- **the Ministry of Development, Trade and Tourism make available sufficient resources to assist with implementation;**
- **the regional Advisory Committee to be requested to endorse the commitment for implementation funds; and**
- **an implementation process be adopted and an implementation schedule be prepared.**

Much work remains to be done to ensure the successful development of the region's tourist industry. The following two exhibits record a summary of the likely roles and responsibilities of various private and public sectors.

EXHIBIT 6-1

PRIVATE-SECTOR ROLES AND RESPONSIBILITIES

PRIVATE-SECTOR SOURCES	FINANCIAL	PLANNING	MARKETING	MANAGEMENT	RESEARCH
Chambers of Commerce	Enhance awareness of the Canada Opportunities Investment Network and segment its applicability to the tourism industry		General tourism marketing for the region - Provide visitor services information	Create directory of community tourism development opportunities and promote to investors	Collect community tourism statistics
Individual Operators	Invest in expansion of tourism plant Contribute to funding of regional and community marketing program Support local tourist bureaus	Increase commitment to providing visitors with the best possible experience Remain aware of and meet customer needs, wants and trends	Work with other operators to develop tour packages Market packages to wholesalers with assistance of the Ministry of Tourism Assist/support "family tour" program for tourist bureau employees Register with B.C. Reservation System Maintain market awareness	Improve marketing, business and hospitality skills of staff Upgrade or expand facilities – beautify area Participate in local or regional tourism association Access relevant programs	Survey and track market information of own clients
Regional Tourism Organization (TAVI)	Fund regional marketing activity		Plan/initiate regional "family tour" program for info booth employees Improve marketing coverage of the VI/C Region – increase input from communities Host travel writers to the region Emphasize unique qualities of each area Represent the region at trade shows		Develop and initiate regional tourism surveys
Local Tourism Associations		Promote communication and co-operation among operators in the community Liaise with other local associations on a seasonal basis to review issues of regional concern	Market local area and attractions	Provide training and advice – i.e., for new attractions	Survey visitors to community (visitor centre statistics)
Special-Interest Groups	Fund special events	Provide expertise/assistance in developing (i.e., heritage attractions) Communicate to ensure co-ordination of events/sharing of information Plan local events/festivals Provide advice/volunteers (i.e., to tourism associations) Bid for and host events	Put 'event' calendars together Advertise special events	Help train people to manage attractions relevant to their special interest Adhere to relevant guidelines Identify and promote development of resources Co-ordinate or run local festivals or events Form associations where relevant to co-ordinate specific industry sectors Provide volunteers	Maintain local reserve inventory Research and collate interpretive information

EXHIBIT 6-2

PRIVATE-SECTOR ROLES AND RESPONSIBILITIES

PRIVATE-SECTOR SOURCES	FINANCIAL	PLANNING	MARKETING	MANAGEMENT	RESEARCH	OTHER
Municipal or Regional District Governments	Fund community Info Centres Provide tax incentives to encourage development Reorganize dollars spent on tourism to coincide with strategy recommendations	Ensure community plans are compatible with tourism opportunities and objectives Incorporate tourism devel-objectives into community economic development strategies Endorse land-use policies that encourage tourism Provide easily accessible serviced land for commercial activities servicing travellers Ensure operators are aware of community planning objectives, potential conflicts, etc. Ensure strategy is adopted	Promote the region during special events	Local community or economic development officers should promote co-ordination of tourism development through intra-regional communication (i.e., VIDEA) Facilitate zoning requirements for tourism development The Islands Trust should work with tourism operators to oversee the development of mutually suitable tourism bylaws for the Islands Ensure Info Centres are kept up to standard	Maintain current inventories of tourist facilities	Promote development of community attractiveness (downtown revitalization, etc.) Keep inventory of land suitable for tourism development Compile at the regional district level for distribution to the Province and potential investors Acknowledge and promote the value of tourism
Provincial Government	Expand the VentureNet/ Matching Services Program to include the tourism industry, using property inventory and development potential information supplied by regional districts Provide (cost-shared) funding for feasibility and/or concept studies Continue or improve employment and training programs: - SuperHost - Community tourism employment Continue the Tourism Product Development Low-interest Loan Program Reduce eight per cent room tax Rework P.I.T. funding formula to increase its effectiveness in smaller communities Formalize the Loan Guarantee Program as a tourism support service	Continue or expand tourism training programs Simplify the bureaucratic process for industry representatives wishing to access government assistance Ensure wide distribution of this strategy Compile a bed-and-breakfast directory	Host marketing workshops for operators Encourage development of tour packages Assist operators in liaising with travel wholesalers Provide advisory services for marketing the region Continue the P.I.T. Program but make changes as noted in column one Incorporate significant regional tourism themes into provincial marketing activities Create a replacement for the Tourism-International Market Development Program Market the B.C. Reservation System in tourism publications	Facilitate co-operation among competing resource interests Maintain tourism representation on ELUC. Establish tourism land-use priorities and regulations Promote inter-community co-operation with regard to tourism development and marketing Assist communities in lobbying the Small Craft Harbours Branch PARKS: - Trail biking - Adequate parks services - Effective policing of parks MOTH: Ongoing improvement of signage Fund and oversee development of GIS maps as a means for addressing land-use issues	Collect and distribute market research as required Maintain updated information on operational norms Provide information on value of tourism to assist local communities in making land-use, resource allocation and policy decisions and to quantify the benefits of developing a regional tourism profile Create a replacement for for the Tourism Industry Support Program. Maybe use to help fund additional research into the opportunities identified in this Continue BIC Program but enhance its relevancy for the tourism industry	Ongoing highway improvement Improve ferry scheduling and capacity Conduct community based seminars to explain the strategy and encourage participation Ensure that services provided by the provincial Gov't are effectively meeting the tourism needs of the region (i.e., transportation, marketing)

PRIVATE-SECTOR SOURCES	FINANCIAL	PLANNING	MARKETING	MANAGEMENT	RESEARCH	OTHER
Federal Government	**FBDB:** Continue funding support programs: - Cdn. Business Initiative - Skill Shortages - Community Futures - Matchmaking - Loan Program **INDIAN AND NORTHERN AFFAIRS:** Continue the Resource Economic Employment Development Program. Allow native communities wishing to develop their tourism resources to access the various elements of the program **W.D.O.** Apply Western Economic Development funding to the region's major tourism development opportunities	**PARKS CANADA:** Develop parks policies consistent with the tourism priorities of the region	**PARKS CANADA:** Promote lesser-used park areas to spread the number of visits over a greater number of parks	**COAST GUARD:** - Enforce environment protection measures - Facilitate the movement & servicing of marine traffic **CUSTOMS/ IMMIGRATION:** Ensure adequate staff to facilitate flow of tourist traffic **PARKS CANADA:** - Crowd control - Park maintenance - Trail building - Build more campsites at Pacific Rim National Park **FISHERIES:** Enforce policies to protect marine resources Establish criteria licensing for whalewatching operations **CEIC:** Continue job training programs; expand focus on the tourism industry	**I.S.T./TOURISM CANADA:** Provide information & data re: tourism investment opportunities to investors Conduct and distribute market and product development research	Enhance awareness of relevant Community Future Programs – i.e. business counselling
Local Colleges		Training courses could be provided in these three areas – off-campus courses could be offered in the Central Coast area			Provide software and computer access for storing and analyzing local tourism data Continue to participate in the Enterprise Centre Network Program	

APPENDICES

APPENDIX A

PUBLIC MEETING PRESENTERS

Victoria - Monday, Nov. 5, 1990

Alderman Suzanne Hansen
Ms. Drelene Gibb
Mr. Paul Holmes
Mr. Bruce Davies
Mr. John Adams
Mr. Gary Bentham
Mr. Nick Gilbert
Mr. Jack Reid
Mr. Mick Collins

Cowichan Valley - Tuesday, Nov. 6, 1990

Alderman Bruce Payne
Alderman Jean Brown
Ms. Sheila Kenyon
Mr. Ron Smith
Mr. Mike Osborne/Mr. Tom Walker
Mr. John Dunfield
Mr. Karl Schutz
Ms. Joyce Brookbank
Ms. Susan Lindstrom
Mr. Richard Pope

Nanaimo - Wednesday, Nov. 7, 1990

Mr. Rick Taylor
Mr. Bill King
Mr. Fred Taylor
Mr. Julio Mazzochi
Mr. Al Fleet
Mrs. Jean Petley-Jones
Ms. Kathleen Furness
Ms. Linda Marshall
Ms. Sandra Thomson
Ms. Debbie Freeman
Ms. Miriam Winston
Ms. Lynn Bowen
Mr. Wayne Pesuleau
Mr. Gary Moore
Mr. Ken Ryan
Mr. Neil Dawe
Mr. John Thomson
Ms. Victoria Smith
Mr. Richard White
Mr. David Littlejohn

Port Alberni - Thursday, Nov. 8, 1990

Mr. Lorne Knutson
Ms. Joan Dublance
Mr. Peter Weinold
Mayor Gillian Trumper
Ms. Dorothy Baert
Mr. Tom Schmidt
Mrs. Moarufet
Mr. Fred Bishop

Mr. Wally Piatocka
Mr. Rodney Thur
Mr. Richard Watts
Ms. Judith Hutcheson

Powell River - Monday, Nov. 5, 1990

Mr. & Mrs. Charli and Gerri Parsons
Mr. Byron Johnston
Mr. Ron Hagan
Ms. Karen Southern
Ms. Carol Hamilton
Ms. Deborah Pierce
Mr. Andy Evans
Mr. Scott Sager
Mr. Mike Meade
Mr. Hector Beauchesne
Mr. Steven Golden
Mr. Brian Baldwin

Courtney - Tuesday, Nov. 6, 1990

Ms. Barbara Price
Ms. Carol Martin
Mr. Doug Eddy
Mr. Des Kennedy
Mr. Walt Lengerke
Ms. Debra Ferguson
Mr. David Graham
Mr. Pat Dixon
Mr. Glen Morris
Ms. Peggy Carswell
Ms. Muriel Morton

Mt. Waddington - Wednesday, Nov. 7, 1990

Ms. Linda Hancock
Ms. Maxine Williams
Ms. Noreen Liepens
Mr. Bill Dumont
Mr. Bruce Jackman
Ms. Anne Marie Koch
Mr. Dennis Richards
Mr. John Gantzer
Ms. Kathy Kinley
Ms. Barb Anonson
Ms. Wendy Jakobsen
Ms. Vivien Marchand
Mr. Neil Jones

Bella Coola - Thursday, Nov. 8, 1990

Mr. Karl Osmers
Mr. John Morton
Ms. Patricia Fletcher
Mr. Clifford Hanuse
Chief Archie Pootlass
Ms. Rene Morton
Mr. Neil Ehrlic

APPENDIX B

TOURISM TASK FORCE PUBLIC MEETINGS

SUMMARY OF SUBMISSIONS AND QUESTIONNAIRES

OPEN HOUSE RESPONSE SUMMARY

LOCATION QUESTIONNAIRES	ATTENDEES	PRESENTERS	WRITTEN	
			SUBMISSIONS RECEIVED	RECEIVED
Victoria	25	10	5	7
Cowichan Valley	33	10	8	2
Nanaimo	85	22	5	13
Port Alberni	40	13	9	6
Powell River	20	12	12	8
Comox-Strathcona	25	11	11	5
Mt. Waddington	25	13	9	5
Central Coast	15	6	3	5
TOTAL	**258**	**97**	**62**	**51**

THEME	CRD	CV	NAN	A-C	PR	CS	MtW	CC	TOTAL
Ecotourism		1		6		2	2	1	11
Industrial Tourism		1			1		2		4
Heritage	2	1	1	3	3	5	3	3	21
Marine Tourism	1	2		2	2		8	2	17
Native Culture				3	1		1	2	7
Outdoor Adventure				1	2		2	2	7
Fishing			1	1	4	1	1	1	9
Skiing						1	1	1	3
Sports					3				3
Golf	1				2				3
Arts and Crafts			1		1	1			3
Education			1	1		1	1		4
Tours and Packaging		1		2	1		2	1	7
Health (Spa, Hospice, Handicapped)				1	2	1			4
Major Attractions		1	1						2
Special Events				1		1			2
Harbour Development			1						1

NOTE:

- Some briefs mention more than one 'theme' - thus the total is higher than the actual number of submissions.
- Although some of the briefs identified themes as part of background information they provide for their area - only those referred to in the context of a 'development opportunity' are counted.

NOTES

VANCOUVER ISLAND/COAST TOURISM OPPORTUNITIES STUDY
OPEN HOUSE PRESENTATIONS

- Many of the submissions were geared to emphasizing the tourism resources of a particular area and to highlighting what is already being done to enhance tourism in that area.

- A number of the submissions read like a proposal – "this is what we want to do – how can you help?"

- The submissions placed fairly strong emphasis on what needs to be done by government to encourage tourism.

- It should be noted that 'heritage' as a theme probably received greater emphasis than would have occurred if the task force had been solely 'tourism'-oriented;

- Many of the submissions addressed 'marketing' needs or opportunities rather than 'development' opportunities.

- Many of the questionnaires simply listed existing attractions in their area in response to the question regarding tourism development opportunities.

- A number of individuals who made a verbal and/or written presentation to the task force also filled out a questionnaire. To ensure that this information was not double-counted, we did not include those opportunities for development identified on the questionnaires if we were quite certain a verbal or written presentation had been made.

- There is some overlap in the comments attributed to the verbal and written submissions and those attributed to the questionnaires. Both have been included to given an idea of the emphasis placed on various issues by presenters and the general public.

CONSTRAINTS IDENTIFIED IN SUBMISSIONS

From written/oral submissions:

- Inadequate transportation links (16)
- Lack of marketing support for the regions, especially the smaller communities (13)
- Lack of adequate accommodation, especially during peak season (Powell River, Mt.Waddington, Lake Cowichan) (9)
- The difficulty of obtaining investment and development capital (8)
- Land-use conflicts (7)
- Area not adequately covered by regional marketing activity (5)
- Anti-growth or NIMBY sentiment (3)
- Poor service in the tourism industry – few people take advantage of the SuperHost Program (3)
- Government taxes (i.e., high property assessments on golf courses; need to have assessment relief indexed; eight per cent hotel versus six per cent retail tax) (3)
- Lack of moorage during peak season (3)
- Long approval process
- Dealing with various levels of government
- Lack of information on market information regarding visitors to each area
- Too many local groups or projects competing with each other (4)
- Little opportunity for contact or partnering between regions
- Volunteers overworked
- No specific governmental or funding support program available (yet dollars available for manufacturing, etc.)
- Airfare costs are cheaper between Seattle and Anchorage than from Vancouver to a B.C. fishing lodge
- Current DFO catch limits (problem compared with Alaska)
- Nothing replaced TIDSA; absence of a partnership agreement between the government and the private sector
- Lack of a circle route in the region or on the Island (2)
- Current lack of a tourism development plan to ensure that tourism facilities are properly located and the resource base suitably developed
- Not enough funding available for organizations such as the PRTA
- Perception that tourism is a low-paying industry
- Inadequate ancillary services in some areas – i.e., shops, restaurants (2)
- Many communities need the economic opportunities offered by tourism and cannot afford to wait years for their development
- Businesses do not contribute tourism promotional dollars
- Negative media coverage
- Need to ensure that sensitive heritage areas are adequately protected as tourism is developed – how to patrol more remote heritage areas such as native village sites (2)

- The GST will raise costs, complicate ticketing, billing, etc. (2)
- The municipality in Powell River does not have the jurisdiction to clean up its waterfront
- The final portion of GO B.C. grants and funding for the Community Employment Training Program are not available until a project or program is finished – this makes it difficult for developers to meet cash-flow requirements and can put non-profit organizations into debt (2)
- Environmental impact and engineering studies, etc., are costly and take time
- Reliable hydro
- Brown water
- Need to provide infrastructure before people will come
- Serious staffing issues – students need practical training (2)
- Some areas lack an identity making it difficult to encourage pass through traffic to stop
- Development of condominiums on Parksville waterfront detracts from features tourists come to see
- Developing heritage bridges as attractions creates a liability problem
- Tourism remains very seasonal
- Need to control tourism development
- Operators need help to attend travel shows
- Provincial parks are not all being effectively marketed (i.e., Strathcona)
- There is a real garbage problem at numerous marinas – a more effective garbage collection system needs to devised for existing and new marina developments
- It is difficult for (some) tour companies to get brochures for sites outside the Capital Regional District; in addition, parking for coaches is often difficult at many of the tour locations while many attractions are not open during the winter when coach tours often travel; ferry delays also present problems for bus companies
- The Central Coast should be promoted with the Cariboo-Chilcotin, not Vancouver Island (2)

From questionnaires:

- Pricing strategies aimed at tourists; materialistic exploitation (need to spread resources around more)
- Perception that tourism is 'cheap' and used mainly to generate 'cheap' wealth through the sale of non-conservation-oriented goods (need to have very clear line of operation; idealistic values linked with realism and a political will; end the lottery)
- We still approach tourism as a fun hobby instead of taking a more businesslike approach
- Waterfront zoning may limit flexibility regarding its use by people wishing to service the water-tour business (i.e., gift shops, etc.) (need to liaise with municipal planners and councils to foster a focus on tourism opportunities)
- Inadequate marketing of Victoria as a heritage experience (need to market Victoria's heritage aspect more effectively)

- Over-industrialization; apathy concerning non-destructive aspects of tourism and the importance of historical and cultural information (need to develop special tourism groups such as bird-watchers, horticulturalists, archeologists, etc.
- Insufficient funding; lack of focus; inadequately trained or qualified leadership
- Not enough regional advertising letting people know what each area has
- Lack of funding to initiate and promote specific projects; local and provincial government bureaucracy (support local individuals and initiatives; reduce and relax government regulations) (6)
- Recession/nation-wide downturn in the economy (2)
- Clearcut logging; resource extraction; decreased wildlife habitat reserves (protect more areas through legislation) (4)
- Apathy; factions working against each other (continue the start made to work together within umbrella groups; keep up the enthusiasm of workers; co-ordinate a regional approach to marketing tourism)
- Competition from the real estate development industry (recognize that critical habitat is unavailable for urban development)
- Competition for space; abseentee landlords (i.e., CPR)
- Value of the Canadian dollar; cost of gasoline
- Staff costs for small businesses (provide realistic opportunity for people who request small amounts of money if they are willing to take a chance on themselves)
- Lack of a major attraction in Nanaimo (provide funds for capital costs to build needed infrastructure)
- Construction of a highway through Nanaimo's natural wildlife preserves
- Lack of easy, cheap access to the Island; traffic congestion on roads; local opposition; availability of staff (more ferries; more frequent ferry schedule; keep fares reasonable; another terminal further north; build north/south motorway; careful planning) (2)
- Lack of a 'link' highway (2)
- Lack of funding for boat launching and wharves; camping and RV sites; lack of a road to Mt. Arrowsmith
- Lack of facilities for tourists in the Bamfield area (moorage, launching, garbage, camping, restrooms) (build such facilities in Kelp Bay) (2)
- Inadequate boat harbour at Sayward and off the main highway
- Lack of accommodation and tourism services in the Central Coast (encourage development of bed-and-breakfast operations, etc.)

HOW CAN THE GOVERNMENT ENCOURAGE PRIVATE-SECTOR INVESTMENT IN THE TOURISM INDUSTRY (OR GENERALLY ASSIST THE INDUSTRY)?

From written and oral submissions:

- Improve transportation links and schedules (9)
    - Pt. Alberni Highway
    - Powell River Ferry
    - Airstrip at River's Inlet
- Speed up approval process/streamline bureaucracy (8)
- Connect investors with the tourism sector (6)
- Find a satisfactory and equitable solution to land-use issues – encourage integrated resource management (4)
- Provide business and technical help – i.e., marketing, dealing with hydro and water issues, providing relevant information (4)
- Encourage communities to work together (4)
- Encourage quality rather than quantity of development
- Create a process which will give tourism a legitimate role in decision-making regarding local resource use; there needs to be a political will to maintain a strong tourism resource base (2)
- Educate people regarding the opportunity and benefit of forestry and tourism working together in the interest of all land-users (2)
- Keep a customs officer in Port Hardy
- Create a Venture Capital Program
- Provide loan guarantees
- Provide low-interest loans
- Provide tax incentives
- Provide financial assistance for the development of facility infrastructure
- Expedite funding which is available
- Provide assistance in co-ordinating package development
- Make relevant studies and statistics easily available to the private sector
- Develop a network of attractions and services geared to make people stay in the area longer
- Ensure that provincial parks are adequately maintained
- Protect heritage buildings and sites (2)
- Establish a licensing system for whalewatching operators (2)
- Patrol private boaters; enforce marine related regulations (2)
- Foster awareness regarding the benefits of tourism
- Encourage and practise better communication, co-operation and facilitation
- Provide matching funding for the Pacific Rim Artisan Village and incorporate this theme into the strategy

- Allow regional districts to assume the role of marketing each area
- Assist local areas to access tour companies
- Develop a series of regional commercials
- Provide hospitality, business and marketing training
- An annual or semi-annual conference should be sponsored by the Ministry of Tourism to encourage increased interaction between members of the tourism sector and to facilitate co-ordination of service training and promotional partnering
- Establish a pilot project where an employee of the Ministry of Tourism is assigned to assist a local tourism association
- Assist communities in dealing with small craft harbours
- Support sectoral marketing of fishing using PIT dollars
- Government financial incentives and assistance should be targeted toward family rather than investment-oriented businesses
- Give the private sector first consideration on shared-wage programs (except for InfoCentres). Ensure that the number of students allocated through the Challenge and Community Training Program are adequate to meet the staffing needs of non-profit tourism organizations
- Increase partnership promotion programs
- Continue Partners in Tourism Program
- Encourage individuals to develop packages or products which will be 'one of a kind' and encourage repeat business
- Don't let the whole Island be blacktopped; develop innovative promotions for the region – i.e., 'plant a tree in B.C.' versus coupon books
- Promote cultural tourism
- Provide tax shelters for heritage building developers; use heritage buildings as government offices
- Provide student museum training courses at the community level
- Allow non-profit attractions to advertise for free in regional brochures
- Ensure information re: relevant meetings or events (i.e., the task force hearings) is provided in enough time for groups to participate

From questionnaires:

- Provide leadership, make a plan, ask people to get involved
- Continue SuperHost (or improve 'Encore') and provide appropriate courses for middle and upper management and supervisors (2)
- Facilitate zoning applications
- Teach people that tourism pays (4)
- Develop a "meet the people" program; develop an "Ask Me" button program with buttons worn downtown by citizens willing to assist tourists
- Provide education, information, workshops and conferences, organization, retreats, etc., on tourism (3)

- The regions should assume responsibility for tourism and everyone should be taxed a small amount to promote it
- Provide assistance and direction to assist areas develop their tourism potential (2)
- Offer incentives such as reduced taxes, loans and start-up grants (3)
- Provide a government policy on harvesting of timber (2)
- Offer funds (i.e., low-cost loans) for studies and development (8)
- Direction and encouragement needs to come from all levels of government; encourage chambers, rotary clubs, etc., to take a leading role
- Earmark money for co-operative marketing projects, especially for smaller communities (4)
- Continue to support education and tourism programs – i.e., Malaspina College (2)
- Promote Pott Alberni as an area to develop tourist oriented businesses – i.e., low land costs
- Liaise with B.C. Ferries re: scheduling, the Queen of the North, etc.
- Improve signage
- Address native land claims and land-use issues (2)

HERITAGE TOURISM

- Ongoing promotion of Victoria's historic sites (Craigflower Farm and Schoolhouse, Point Ellice House, Helmcken House, Carr House)
- Provide tour maps and fact sheets, and co-ordinated promotion of cemeteries
- Provide operational funding for the Kaatza Museum
- Develop the Bell Tower School (including giftshop, meeting room, etc.)
- Create a historic boat for tours – Cowichan Valley
- Develop a Vancouver Island Museum guidebook (2)
- Develop Robbins Gardens as a heritage tree park – Nanaimo
- Refurbish the Nanaimo Bastion (2)
- Develop regional heritage theatres
- Develop the Kinsol Trestle near Shawnigan Lake
- Develop the MacLean sawmill and the Santiago in Port Alberni
- Develop Bamfield's water-oriented heritage
- Hold heritage workshops in Tofino
- Capitalize on Port Alberni's industrial heritage – especially as it relates to the forestry industry – i.e., an industrial museum, develop the MacLean mill as a working mill
- Incorporate Port Alberni's maritime heritage in its waterfront park development through the development of a maritime museum
- Develop a train link between Port Alberni's Harbour Quay and the MacLean Mill and use heritage trains to take people back and forth
- Develop heritage tours in Powell River; add restaurants with heritage meals, shopping with crafts, events with a heritage theme – i.e., logger sports, antique boats, etc.
- Develop heritage logging displays at Willingdon Beach in Powell River along with wheelchair accessible trails, picnic sites (tie-in with industrial tourism)

- Develop the Townsite project in Powell River – complete with heritage bed-and-breakfasts, etc.
- Develop a heritage house into a hospice within a park (Courtenay)
- Develop Cumberland's #8 mill to the paleontological site through the use of a rest stop along the highway and signage relating to the interpretation of fossil material
- Support development of the oriental cultural centre (Cumberland)
- Protect the 1912 Beban Hotel in Courtenay
- Encourage retention of the Princess Marguerite to continue Victoria-Seattle run (2)
- Encourage use of the E and N rail line to run a steam train giving tours up the Island (3)
- Protect the heritage rail route in Comox for use as a cycle path and nature trail (highway scheduled to affect it)
- Develop Fort Rupert Hudson's Bay Company Fort
- Establish a living museum in Alert Bay
- Refurbish heritage buildings in Sointula
- Create an outdoor heritage park at Seven Hills Golf Course in Mt. Waddington
- Develop Suquash mine site
- Develop a museum and interpretive display of Coal Harbour's military history
- Create an inventory of underwater heritage resources
- Develop or refurbish canneries in the River's Inlet area
- Complete development of the Alexander MacKenzie Heritage Trail
- Establish a regional archival office in Nanaimo to help visitors search for their 'roots' and to help smaller archives document and preserve material

From questionnaires:

- Victoria waterfront maritime museum
- Promote Victoria and its range of heritage sites as oldest city in Western Canada
- Provide interpretative information that makes heritage and history come alive
- Promote Morden Mines, heritage trees and areas such as Robins Gardens (Nanaimo)
- Promote and develop Nanaimo coal mines (3)
- Develop and promote Newcastle Island (3)
- Preserve and upgrade the E and N Railway (3)
- Revitalize downtown Nanaimo
- Develop the MacLean mill in Pt. Alberni (2)
- Build a museum documenting the history of the Bamfield area

ECOTOURISM

- Develop a demonstration forest in Duncan
- Offer guiding services for people going to the Carmanah or Walbran Valleys
- Provide boat oriented nature tours in Clayoquot Sound
- Build trails in the Clayoquot Sound

- Develop lodges on the outer beaches of Clayoquot Sound, Meares Island, Vargas and Flores Island and the Megin River and Lake System
- Develop a system of sea to sky trails across Vancouver Island from Clayoquot Sound, through Strathcona Park to Campbell River
- Offer birdwatching, wildlife discover, biology (rainforest, intertidal discoveries) workshops in Tofino
- Develop underwater viewing opportunities on the west coast
- Protect Englishman River Estuary as a nature reserve and encourage wildlife viewing
- Promote Strathcona Park (and develop its perimeter)
- Create a whalewatching interpretive centre in Mt. Waddington
- Create an interpretive facility at the Alert Bay Marine Station
- Finish Raft Cove masterplan and initiate development of an access road
- Upgrade the Cape Scott Trail; establish a park headquarters with a caretaker
- Adopt an integrated land-use approach to the development of the Broughton Archipelago – i.e., marine access, a whale museum
- Promote the opportunity to photograph bears in the Central Coast rather than shoot them
- Build a Discovery Resource and Environmental Centre at Black Creek which would include an orientation centre, audio-visual displays, a theatre for workshops, etc., all geared to the subject of the interrelationship between communities and the environment
- Support the development of the Vancouver Island Backbone Trail – a 640 kilometre trail running from Cape Sutil to Victoria
- Develop a wildlife theme park emphasizing birds of prey
- Encourage ongoing development and support of the Ecomuseum
- Promote birdwatching and wildlife viewing generally (3)
- Link Vancouver Island communities by trails

From questionnaires:

- Focus on natural resources such as waterfront, sea, lakes, rivers and forests
- Promote hiking and development of a trail network
- Promote wildlife viewing
- Promote Englishman River Estuary; brant migration; bald eagle population; salmon spawning rivers
- Promote ecotourism opportunities in Alberni-Clayoquot

ACCOMMODATION

- Build a resort hotel in Tod Inlet
- Build hotels, motels and campgrounds in Lake Cowichan
- Build a destination resort at Sechart Whaling Station (the closest private property to the Broken Islands)

- Develop more campsites in Port Alberni/Bamfield (2)
- Build a destination resort at Sproat Lake
- Build a wheelchair accessible hotel/convention complex in Powell River
- Build a high-class hotel in Bella Coola (with bilingual staff – German/Japanese)
- Build a destination resort in the Mt. Waddington area
- Expand or develop a bed-and-breakfast program, especially in the Central Coast and Mt. Waddington
- Build a fully serviced RV campground in the Central Coast

From questionnaires:

- Build a first-class RV park in Alberni-Clayoquot (2)
- Build motels, lodges, destination fishing resort in Alberni-Clayoquot
- Build and improve hotels in Powell River

MARINA/MARINE TOURISM

- Build a marina in Tod Inlet as part of a resort and golf course complex
- Build a marina on Lake Cowichan
- Build a marina and provide more moorage space in Pt. Alberni (2)
- Enhance pleasure cruising, ocean kayaking, canoeing, windsurfing, diving in Powell River
- Develop a luxury overnight charter boat service in Bella Coola
- Develop water circle tours
- Expand moorage at Alert Bay
- Expand marina and breakwater at Sayward
- Establish a coastal ferry system in Bella Coola (possibly a 'mini' cruise from Pt. Hardy to allow for the creation of a circle tour)
- Develop the pocket cruise ship industry in the Central Coast
- Build a marina in Port MacNeill (and combine with waterfront and town development on a maritime theme) (3)

From questionnaires:

- Water park recreation – Victoria water tour
- More marina development in Alberni-Clayoquot (with restaurants, etc.) (2)
- Build a boat launch and moorage facility in Kelp Bay (10 minutes from Bamfield)
- Provide a water taxi service in Bamfield
- Encourage waterfront and marina development relating to tourism in Powell River (3)

INDUSTRIAL TOURISM

- Expand forestry tours on the North Island – i.e., seven days a week, include pulp mill, etc.
- Enhance awareness of Canfor steam train at Woss – i.e., signage
- Incorporate visits to industrial sites as part of longer tours
- Generally focus on the region's industrial history (3)
- Develop a train tour to cater to industrial heritage
- Develop a demonstration mine on Newcastle Island
- Integrate forestry and tourism through selective logging

From questionnaires:

- Develop logging tours which connect the history of logging with present-day logging operations

FISHING TOURISM

- Build lodges at Pedder Bay, Sooke, Fair Harbour, Kuai River, Comox, Port Hardy, Clayoquot Sound, Lasqueti Island and, perhaps, Smith Inlet
- Build freshwater lodges
  Develop more guide and charter boat services in Clayoquot Sound
- Encourage freshwater fishing in Powell River
- Make people aware of fishing opportunities in Nootka Sound and Muchulat Inlet
- Develop a major fishing derby for the whole strait (i.e., $1 million prize – Powell River would organize)
- Encourage development of a fishing resort based on native culture at Rivers Inlet

From questionaires:

- Develop lodge fishing
- Promote sports fishing in Alberni-Clayoquot

NATIVE CULTURE TOURISM

- Create a museum in the Rivers Inlet area (Waikino??) based on a traditional longhouse and use it to store artifacts found in the area
- Post plaques to explain native archeological/village sites in the Rivers Inlet area
- Build a native cultural complex in Bella Coola to tie in with cultural and environmental tourism celebrations relating to Alexander MacKenzie, etc. – this could also interpret marine and freshwater resources, the natural history of the Pacific Coast rain forest, and primary industries (2)
- Develop more authentic native culture facilities and exhibitions

- Continue and expand the festivals at Kelsamaht on Vargas Island – i.e traditional songs, foods, arts and crafts, etc.
- Build an Ahousaht longhouse at the above site; offer anthropology and archeology seminars
- Expand ocean-going canoe tour opportunities (Ahousaht)
- Encourage the native community in Port Alberni to hold (more?) special events, exhibits, artwork and festivals
- Encourage native bands to share their culture through co-ordinating events, schedules and themes

From questionnaires:

- Develop hiking trails at Alert Bay which reflect traditional native lifestyles

OUTDOOR ADVENTURE TOURISM

- Support development of "handicapped accessible" outdoor adventure tours and lodge in Powell River
- Establish a kayaking launching site near Telegraph Cove
- Promote and develop scuba-diving opportunities on the West Coast
- Enhance scuba-diving opportunities in Mt. Waddington
- Develop access to Raft Cove (Mt. Waddington)
- Hold 'outdoor' schools in the Central Coast
- Promote sea kayaking in the Central Coast

From questionnaires:

- Promote outdoor adventure opportunities in Bamfield (hiking, camping, birdwatching, diving, kayaking etc.)
- Promote outdoor adventure tours and opportunities generally (6)
- Develop water recreation and hiking opportunities near Alert Bay
- Encourage development of outdoor adventure opportunities in the Coast Mountains
- Promote and develop off-season diving opportunities in Mt. Waddington

ARTS AND CRAFTS TOURISM

- Develop an arts and crafts market at Tofino
- Develop an artisan's village in the Cowichan Valley
- Include the sale of crafts as part of numerous themes – i.e., native crafts, heritage crafts, etc.

From questionnaires:

- Downtown public art gallery (Victoria)
- Performing arts centre
- Artists in the street – drawing, carving, painting the local streetscapes; encourage direct contact between the artist and tourists

GOLF TOURISM

- Develop golf tours
- Use prizes and achievement awards as incentives to have people compete in tours
- Develop golf packages – i.e., combine with freshwater/salt-water fishing, accommodation, etc.

SPORTS TOURISM

- Host disabled sports events in Powell River
- Develop and promote bike circle tours
- Capitalize on 1994 Commonwealth Games
- Generally promote mountain biking (i.e., on abandoned logging railway?)

HEALTH TOURISM

- Promote Inland Lake Trail, disabled access diving site, etc., in Powell River
- Develop and promote rehabilitation opportunities in Powell River
- Develop a prototype wheelchair accessible convention complex and 50-room hotel
- Support Hospice in the park – Courtenay

SKIING TOURISM

- Develop skiing and heli-skiing in the Central Coast (2)
- Continue to expand Mt. Washington summer program
- Pave road to Mt. Washington
- Encourage further development of Mt. Cain
- Develop and promote cross-country skiing

From questionnaires:

- Promote development of Mt. Arrowsmith ski area (2)

PACKAGING/TOURS

- Educational, cultural, specialized retreat to Tofino
- Port Alberni could capitalize on the Whale Festival to develop day-trips, etc.
- Develop circle tours in the Powell River area – i.e., heritage, cultural and/or native, fishing
- Co-ordinate package tours to coincide with special events thus giving people more to do
- Support the development of outdoor adventure tours for the disabled in Powell River
- Promote pre- post-convention activity and packages
- Develop weekend getaway packages to small or unique (island) resorts
- Develop theme based tours – i.e., wildlife viewing, flower identification

From questionnaires:

- Develop specialized tours – archeological, horticultural, bird-watching, etc.
- Encourage small conventions at the Cowichan Community Centre
- Encourage the development of Cowichan as a destination area
- Develop regional tour packages to spread accommodation requirements and benefits
- Develop tours that operate year-round

OTHER IDEAS

- Expand services of the Lady Rose
- Develop Nanaimo Harbour
- Hold more special events
- Develop guest ranches in the Central Coast
- Build an interpretive centre on the North Island
- Establish a 'cruise' link between Bella Coola and Port Hardy
- Build a sternwheeler (heritage) and provide tours in Brentwood Bay, to Bamberton, etc.
- Develop a super InfoCentre - Nanaimo
- Develop and promote railway tourism
- Develop the Central Coast hotsprings

From questionnaires:

- Develop tourism related to basic human needs, environmental health – i.e., small group walks around homesteads, etc.
- Safe and comprehensive bike paths and pedestrian greenways
- Theme park recreation
- Provide passenger train service for the Island
- Develop a large-scale attraction (Nanaimo)
- Develop the Nanaimo waterfront (3)

- Promote Nanaimo as a destination area (3)
- Build the "link" highway
- Build the 'Fish University/Institute of Nanaimo'

APPENDIX C

QUESTIONNAIRE

VANCOUVER ISLAND/COAST TOURISM DEVELOPMENT OPPORTUNITIES STUDY

NAME:__________________ ADDRESS: ____________________________________

AFFILIATION:____

PHONE: _________________ DATE: ______________________________________

1. What are the major tourism strengths of your community/the region?

   Your Community:

   Vancouver Island/Coast:

2. What are the major tourism weaknesses of your community/the region?

   Your Community:

   Vancouver Island/Coast:

3. What tourism trend changes have you noticed in the past few years regarding...

   Visitor Volumes:

   Visitor Origins:

   Length of Stay:

   Party Composition:

   Seasonality:

   Activities:

4. What do your feel are the main tourism development opportunities? (*Ideas for tourism development*)

Your Community:

Vancouver Island/Coast:

5. What are the main obstacles/concerns which are likely to face your community's tourism industry in the future?

6. Do resource conflicts face tourism in your community? How serious are they? How will these affect tourism development? How can they be addressed?

7. What themes/activities/facilities/markets could form the basis of future tourism development in the region/your community? (*Refer to community or regional focus*)

Themes:

Activities:

Facilities:

Markets:

8. What should be the objectives of a regional tourism strategy?

9. What are the key issues which may inhibit communities in the Vancouver Island/Coast Region from working together to promote/develop tourism on a regional basis? How can these issues be addressed?

10. What role do you feel the following agencies should play in the implementation of a regional tourism strategy:

Federal Government:

Provincial Government:

Municipal/regional Government:

Local Tourism Organizations:

regional Tourism Organizations:

Special Interest Groups (i.e., Heritage Societies):

Individual Operators:

Others (please identify):

11. How can increased private sector involvement in the tourism industry be encouraged?

12. Are you aware of any studies/information which are relevant to this study?

APPENDIX D

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